

THE SUSTAINABILITY OF CREATIVE CITIES:

Lessons from Leicester and London

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Creative Cities

Creative Cities and Urban Renewal



The creative city as a distinct urban economic form can be understood as a co-constitutive feature of the post-millennium period. In the years leading up to, and those immediately following the Millennium, several industrial cities began to witness a reversal of their economic fortunes, tied to a new productive vision for their cities and leading to a sustained period of growth. Whilst it had been commonplace from the 1980s to frame industrial cities as outputs of the past, in acknowledgement of the prolonged and urban nature of manufacturing decline, by the turn of the millennium, many former industrial cities were being viewed favourably as resources for the future. Drawing on notable demonstrators in Baltimore in the USA, Barcelona in Spain, and Manchester and Glasgow in the UK, it became common to revitalise urban economies through large-scale programmes of urban renewal drawing on the key policy ideals of Civic Boosterism (Logan and Molotch, 1988¹) and implementing a distinct programme of Proactive Regeneration (Jeffrey and Granger, 2017). The accelerated co-constitution of the creative economy with urban renewal provided an impetus and framework for revitalising city spaces. The creative city model provided a rationale for re-imaging and re-branding a city, re-purposing redundant buildings, as well as providing a new built environment tied to creative work and culture, all of which was met through urban renewal.

Arguably, the emergence and then mainstreaming of the creative city has provided the fix for former industrial areas; offering the latest permutation of the city form as a solution to the overheating of the macro economy and slowing returns on investment in other sectors (see Lefebvre, 1970, 1991; Harvey, 1985, 2001; Jessop, 2006). Whilst the global financial crisis devastated the macro economy from 2006/7 onwards, putting further pressure on other sectors, and immobilising extensive plans for urban renewal on both sides of the Atlantic, growth and investment in creative cities continued throughout this period. As a result,

the creative pound and the lure of creative offices and creative workers have international currency and are viewed as catalysts for economic and urban growth. For many cities, the creative model offers a route out of long-term structural decline and the financial pressures associated with the global financial downturn. Or does it?

The creative city has its intellectual origins in the post-industrial role of the city, initially envisaged as knowledge work (Touraine, 1971; Daniels, 1973) but in recent years framed as higher-level creative work (Andersson, 2011; Landry, 2000; Florida, 2001). Creative work in this context refers to the growth of innovation and enterprise tied to creative-led activities in service sectors, and to knowledge-intensive businesses (KIBs). The notion of a creative class of workers and more recently a super creative core, who are tied to these advanced services and higher-level production activities, has led to different designations of creative activities ranging from the arts and crafts, design, fashion, film, TV and music, to digital media (see DCMS 2001; Howkins, 2001; Hesmondhalgh, 2002).

Whilst there are inevitable differences in designation, there is also some broader agreement that at their core, creative activities have their origin in creativity, skill and talent, which are commercially exploitable.

Thus creative cities at their most simplistic level, might be viewed as the spatial manifestation of this creative economy and viewed primarily as an economic commodity. A more nuanced definition of a creative city, building on Chapain et al (2013), might be “a vibrant place that draws creative workers who provide intellectual talent, and also provides the propitious infrastructure and social spaces needed to actively sustain creative economic activity” (Granger, 2018, p3/4). Implicit in this definition is that far from being just an economic transaction, the creative city is an active creative space and live ecosystem, through

¹ Boosterism is the act of promoting (boosting) a city to improve wider perception, with the view to increasing investment in key areas or sectors.

and by which creative value is constructed and mediated. As such, a successful creative city might also be viewed as a social ecosystem and urban innovation system.

Notwithstanding their social functions, the UK’s creative industries and creative cities are the engine of the UK’s productivity and innovation, and shape the UK’s international image and economic appeal (Bazalgette, 2017; CBI, 2014). They are at the heart of our competitive advantage (UK, 2018), play a central role in the UK’s industrial strategy and exports, in the strategic direction of the so-called Northern Powerhouse and Midlands Growth Engine, and in driving

innovations in emerging technologies, and R&D clusters. The creative industries generate in excess of £92bn per year, growing on average 5 per cent per year, and representing around a tenth of jobs (3.04m) nationally. As such, the UK’s creative industries represent one of the most valuable sets of skills and sectors in the UK economy, which at an international level is unrivalled.

Culture, as one aspect of creative industries (cf. ICTs, design) has become a valuable commodity for cities whose “cultural boosting” (Engberg, 2017) plays a leading role in revitalising community and urban spaces. In some cases,

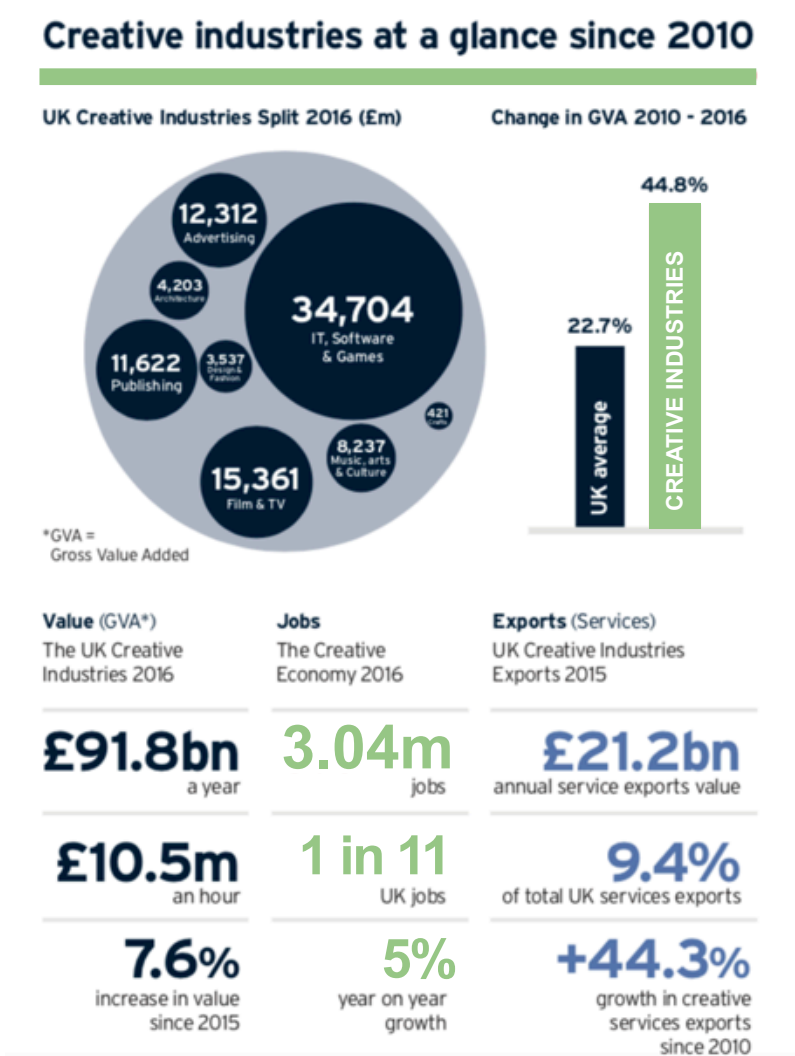
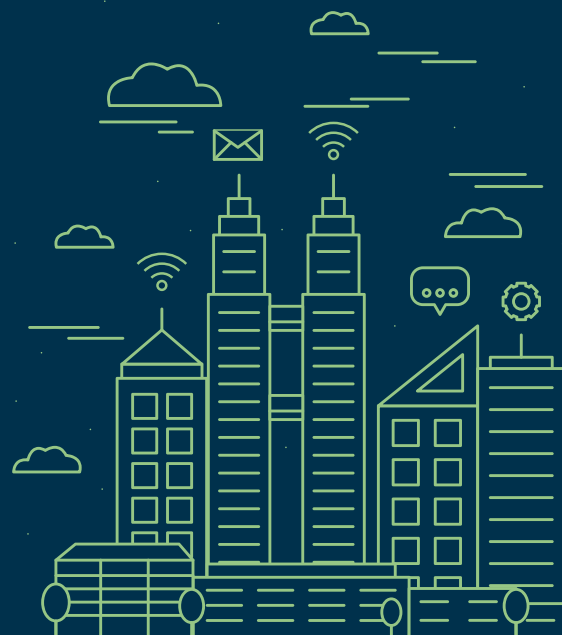


FIG 1 – THE VALUE OF THE UK’S CREATIVE INDUSTRIES • Source: UK, 2018, p6

flagship development of art galleries and theatres have been ingrained in the wider vision of the renewal of cities, whilst elsewhere softer investments in developing meandering districts or quarters characterised by warehouses and pop-up culture, metabolise new economic uses of a cityscape around culture and consumption - galleries, bookshops, cafes, boutiques, festivals, fairs and so on (Veblen, 1899; Bell, 1976; Trigg, 2001). For this reason, creative cities can be a useful but also wide-ranging construct for considering multiple aspects of a city, from its economic and industrial credentials through to its community and cultural offer.

“It’s an exciting time for the UK’s creative industries, with the sector making up 8% of UK service exports and winning awards around the world. The Creative Industries Sector Advisory group is working with UKTI to make sure we have a strategy in place to build on that international success and reinforce the UK’s place as a world leader for the creative industries”.

Tim Davie, Co-chair Creative Industries Sector Advisory Group



The Sustainability of Creative Cities

For whom the Creative City?

Beyond the rhetoric, the creative city has developed spatialities of contestation. Whilst used as a shorthand term for economic and social growth, and in the UK's case, as an international exemplar and export, in practice, for whom the creative city?

Far from creating the urban idyll, creative cities have frequently been linked to revanchist, state-led gentrification underpinned by aggressive urban renewal initiatives (see Smith, 1996; Zukin, 1982, 2010; Jacobs, 1961, 1969); creating divisive communities and disjointed policy ambitions at the city level.

In other respects, creative revitalisation is a mixed blessing. Cities can be overwhelmed by the extravagant claims that growth will solve local problems. In reality, they can boost well-placed businesses and professionals, and lead to a fixation with securing footloose professionals and their investment, as a type of socio-economic cleansing of a local demographic. This is reflected in the use of gentrification strategies as conscious acts involving investment in a neighbourhood to make space for new affluent classes (Smith, 2000). Whilst framed as beneficial to an area where this results in increased tax revenues and improved aesthetics (Clay, 1979; The Economist, 2015) the pejorative nature of gentrification as a process, which displaces old communities with literally a new gentry (Glass, 1964) creates a “new imagineering of an alternative urbanism” (Ley, 1996, p5), which in practice has been argued to create further inequalities on the ground (Victoriano, 2014). The notion that hipsters or gentrifiers have counter culture attitudes and are engaged in social and political movements, making them useful additions to old neighbourhoods is anything but the case in practice (Victoriano, 2014), and therefore gentrifiers can be argued to be nothing more than colonisers and an “expression of class inequality and...capitalist forces” (Lees et al, 2008, p89).

Who benefits from a Creative City?

Gentrification (including new spaces for affluent classes), privatisation of space through new ownership and exclusive uses of the urban realm, coupled with the growth of infrastructure for conspicuous consumption (see Granger, 2010) raises questions about who benefits from and accesses the creative city, which challenge our ‘Right to the City’ (Lefebvre, 1968) and Rousseau’s discourse on inequality (1754) leading to the ‘Social Contract’ (1762). Both encapsulate the notion of inequality of opportunity and recognise that some policy ambitions and interventions, no matter how well intended, can be socially unequal and detrimental, forming a web of ‘social chains’ (Rousseau, 1754). It raises the question then, ‘who benefits from a creative city?’.

What are the benefits of a Creative City? –

The international fascination with, and perhaps over-use of the creative city narrative through for example, Landry (2000) and Florida (2001) have rendered the creative city as something of a cliché. In the rush to be recognised as creative, policy makers have been criticised for unleashing a series of identikit cities and city strategies, which dilute the original authenticity of creative cities. It could also be argued that the creative city does not in itself offer unique terms of reference or a new model for growth vis-à-vis the post-industrial city (see Touraine, 1971; Bell 1973; Castells, 1989), urban modes of production (Soja, 1989; Harvey, 1985), alternative economic spaces (Gibson-Graham, 1996) or the New Economic Geography (see Fujita and Krugman, 2004). It raises the question then, ‘what are the benefits of a creative city?’.

Is the Creative City sustainable? - The idea that cities direct urban renewal efforts to create creative and cultural offers, tied to conspicuous consumption (Veblen, 1989) and the live-work lifestyles of an elite and footloose worker group, raises legitimate concerns about the economic returns from creative revitalisation. A reasonable supposition is to question to what extent investment in cultural flagships, a purpose-built

environment, and new uses of a cityscape is 'nothing more than a spatio-temporal fix' (Jessop, 2006, p 143) that allows for investment of excess capital in temporary projects until such time that investment in mainstream opportunities yields more lucrative returns. In this sense, the creative city could be argued to be a spatial fix; transitory in nature, allowing returns on investment, but making minimal contributions to the wider local economy. It raises the question 'is the creative city a transitory, elitist, and unsustainable form?'.

Project Focus

The purpose of this report is to capture the creative city experience in everyday terms, drawing on empirical research with creative workers and residents in two creative cities: Leicester and London. The intention is to subject the notion of the creative city construct to further scrutiny and to provoke wider debate about the design, practices, and ambitions of a creativity city within the context of a city's economy and society.

The cities of Leicester and London were selected to represent distinct creative cities with different outlooks, policy focus, and behaviours. There is a tendency in the literature and policy to use Creative Cities as an amorphous term, which assumes the same behaviour and impact, whilst in practice, a taxonomy of different creative cities would be beneficial. London acts as an international creative city (worth £42bn annually), which exports worldwide, secures inward investment and international workers, and is indicative of its world city status. There is some evidence that London's creative city found predominantly in East London around Tech City, Old Street, Shoreditch and Hackney has an influential impact on the global creative economy. By contrast, Leicester's creative city, which is tied irrevocably to its industrial heritage and cultural ambitions including its Cultural Quarter, is a medium-sized former industrial city, which competes with Nottingham to the North and Coventry and Birmingham to the West as regional centres. Both London and Leicester have an above-average concentration of creative activities but arguably with very different experiences and trajectories.

The Sustainability of Creative Cities project, which took place during 2017 sought to view the creative city through multiple lens. Data was captured through interviews with 21 creative workers, stakeholders, and students, as well as participant and non-participant observations in East London and Leicester's Cultural Quarter. Drawing on the questions, which emerge from a critical reading of the creative city literature, three main areas of focus have shaped the project and this report:

1. Equity

Does a creative city favour one demographic group over another, in terms of policy attention, resources, and impact? How does subscription to a creative city discourse and policy framework play out locally in a way that serves the interests of residents? In the literature, much is made of creative workers, or the so-called 'Creative Class' (Florida, 2001) but who are they and can anyone be a creative worker? Can anyone participate in a creative city through their cultural and social capital?

2. Value

What are the short and long term impacts of creating a creative city? What measures have been put in place to measure impact? Are some benefits of a creative city symbolic rather than economic, and what role do they play in boosting local wealth, skills, social mobility, and equality? Does creative investment represent good value for money and what are the opportunity costs of investing in a city's creative and cultural offer? What is the comparative value of a creative city?

3. Sustainability

Beyond the prestigious aesthetics and new city personality, are there credible and long term ambitions for a creative city, that can be realised? Is the longer-term trajectory of creative workers beneficial for a city and for urban growth? Do creative cities introduce new problems that undermine longer-term sustainability?

The key messages from the study are:

1. Creative Data Desert

More efforts are needed to secure robust data in cities outside London, to provide the granularity of data needed to analyse creative economies, and to support local policy making. The current paucity of data from the Office for National Statistics generates patchy information relating to the wealth generation of creative activities in cities, and in the socio-economic make-up of creative bases, and the study highlights a need for more economic, relational or network data to uncover important inter-relationships between sub-sectors, and to identify key spaces and platforms in cities.

2. Creative Wealth

It is often assumed that the creative city model is valuable for a city without fully taking account of the sectoral and spatial impact of this. Whilst London's creative make-up generates wealth in high-value economic areas, Leicester is disadvantaged by a creative occupational segregation (or the wrong creative industries) and also a city and gender pay gap. As a result, Leicester's creative economy produces very low per capita wealth, meaning that the social image of its creative industries outperforms its current economic value. Finding ways to grow higher-value economic activities in Leicester, including growth of professional support services, higher business ownership, and greater traded interdependencies within the city would raise the economic value of the creative economy and position this as a legitimate economic regeneration model.

3. Local Buzz or Anchors?

The study highlights how creative-led activities are underpinned by either Buzz (local interactions) or Global Pipelines (that anchor global R&D) in a creative ecosystem. Creative cities need to not only attract creative workers and investment but also to ensure that their unique creative ecosystem provides for the right buzz, skills, and knowledge transfer to sustain future activity.

4. Creative Investment

The study reveals that more is needed by way of size and types of investments to ensure continued growth and vibrancy of creative ecosystems but also to prevent the growth of identikit creative cities.

5. Creative Talent

Whilst London's image as a creative powerhouse exerts a gravitational pull on creative workers and projects an image of 'Brain Gain', Leicester would benefit from improved promotional work to ameliorate the effects of its current 'Brain Drain'. Enhanced creative talent could be secured from higher retention of students that collectively would to underpin creative churn in Leicester's creative ecosystem cities, and lead to higher-value creative work. Further work is needed to assess the vibrancy and appeal of Leicester to graduates and other creative talent.

The key messages from the study are:

6. Unequal Creative Work

The evidence from the London and Leicester case studies support the wider idea of precarious work and liminality in the creative industries, which is likely to compound class and ethnic divisions. Contrary to the image of creative industries as being open for all, the study reveals that without the right sort of support, the creative industries are likely to provide limited opportunities for social mobility from some ethnic and socio-economic groups.

7. Creative-led Gentrification

There is considerable evidence of further expansion of the creative city in East London creating new pressures for local people, which manifest through unaffordable housing, land-use change, and an eroding sense of community. There is compelling evidence of local ethnic communities in Hackney being priced-out of local communities, being unable to access and benefit from changes to the local landscape as a result of urban renewal, or to access the economic opportunities of a creative economy. Leicester's strong sense of community as well as longer-term stability in its demographic and physical make-up did not support the idea of creative-led gentrification.

8. Ditch Shoreditch as a Creative Exemplar


There are inherent dangers of the Shoreditch creative city model, which in every respect is unsustainable. The East London creative ecosystem is inadequate for supporting local workers and communities, or workers who come

to London to develop careers in the creative industries. With a model aimed towards 'growth at all costs', Shoreditch is nothing more than a byword for neoliberal approaches to urban renewal, labour exploitation, and unaffordable living, which disenfranchises the neediest in society. There is also compelling evidence that London's creative industries are reaching saturation point and that growth is slowing.

The intention is that this report will create a space for wider debate on creative cities on the ground in terms of policy design and learning from experience. The hope is that readers find the report and key messages useful.

Further exchanges on creative cities policy design will be reported through De Montfort University's Centre for Urban Austerity and its Creative and Cultural Industries Research Group.

 <http://cura.our.dmu.ac.uk>

 <http://dmu.ac.uk/research/research-faculties-and-institutes/business-and-law/cci/creative-and-cultural-industries-research-group.aspx>

The main report of the project and study is also supported by a commissioned film:

 <https://vimeo.com/238256291>



Leicester

Leicester as a Creative and Cultural City



The creative industries are identified as one of the 8 growth sectors in Leicestershire, as outlined in the Leicester and Leicestershire Strategic Economic Plan; the local framework for achieving growth through people, business and place assets.

Leicestershire's historical roots in textiles and hosiery – which lay claim to 'Leicester clothes the world' – is supported by light manufacturing and an industrial fabric consistent with the wider Midlands area. Whilst many of the competitive advantages of Leicester's rich textiles and hosiery were lost as a result of relocation of textiles to low-cost countries during the 1980s and 1990s, the city has retained a buoyant 'fast fashion' and growing 'niche fashion' supply chain, which have shown signs of re-growth as a result of more recent repatriation.

Leicester's creative industries, shaped by the distinctive industrial heritage of Leicestershire presents as a complex interconnection of textiles, fashion, and design, with arts, crafts, and museums/archives, and manufacturing, logistics, professional services, education, and retail. Whilst it is difficult to assess the overall size and value of Leicester's creative economy given the enmeshing of separate industries in this way, it is known that Leicester's specialisation¹ of textiles (LQ7.44), knitting and crocheted fabrics (LQ14.9), leather clothes (LQ9.1), underwear (LQ9.3), Jewellery and related crafts (LQ10.18), design (LQ1.2), and museum and arts (LQ1.41) points to a valuable set of activities in combination, which is embedded in a number of industries up- and down-stream of the value chain. These important areas of technical specialisation not only confer economies by offering advantages of knowledge transfer and support for smaller companies but also for embedding the creative city itself. The City's businesses, educational and training facilities including colleges and universities, buildings and other place-based assets provide not only a rich

repertoire of skills and support but also provide the resources and conditions to incubate further creative activity.

In addition, Leicester's longstanding commitment to culture, which stems in part from its rich demographic make-up has provided additional impetus for growth of the City's creative industries. The city was shortlisted for the 2017 City of Culture, reflecting its rich culture and diversity. Leicester is served by a diverse cultural infrastructure including museums and galleries, theatres and flagship developments (at the Space Centre, De Montfort Hall, and Curve), as well as historic buildings, public art, and an industrial legacy, which is still visible today. Leicester's diverse demographic communities make their mark on local festivals, fashion, dance, cultural traditions and so on, whilst its sports, tourism, and links to Richard III provide a rich cultural mix. The city is served by two universities providing critical talent for its creative and cultural activities, and with specialist facilities in fashion and textiles, music and media, visual and performing arts, museum studies, architecture, and archaeology. Further afield, Loughborough University provides additional talent and expertise in areas of design and digital media, and further education colleges provide a critical space for developing vocational skills in textiles, fashion, footwear, design, visual and performing arts, media and gaming. Arts Council England have recently announced a 25-years commitment to cultural investment in the city, which draws on local talent to develop cultural and creative growth.

¹ Denoting Location Quotients >1 at the 4/5 digit SIC code level (Standard Industrial Classification)

Leicester's Creative Census

The Leicester and Leicestershire Enterprise Partnership estimates that Leicestershire is home to 4,400 creative businesses and 14,100 creative jobs (LLEP, 2015). This is based on official data from the the Business Register and Employment Survey or BRES (for the 2009-2013 period) supplied by ONS and using the four digit SIC codes defined by the Department for Culture Media and Sports in 2014 as industry sectors making up the creative industries (Appendix 1). It is argued here that this ONS data on creative industries significantly undervalues the size of the creative industries in Leicester and Leicestershire owing to the characteristics of the local economy:

- Leicestershire is especially rich in creative activities that fall outside of the standard DCMS sector designations (52 identified SICs), meaning that the official figures mask the true level of creative activities taking place at any given time in the local economy.
- Leicester and Leicestershire have an above-average rate of microbusinesses and freelancers, who are thought to operate below the official VAT/Pay-As-You-Earn (PAYE) thresholds counted in the official business register (BRES). For example, BIS Business Population Estimates for 2016 (ONS, 2017) indicate that around 90 per cent (89.8%) of businesses in Leicester and Leicestershire are micro (employing 0-9 people), compared to 84 per cent for the UK as a whole, revealing a significant above national average trend for microbusinesses in the local economy. As such, BRES estimates of 83.86 per cent of local companies being micro-sized and 10.77 per cent of these being creative fall short of what is known locally about the extent of business units and transactions that make up Leicester's creative economy.
- Leicester and Leicestershire have an above-average concentration of creative sectors, in which microbusinesses are prevalent at the national level, further compounding the situation. This includes weaving and finishing of textiles, knitted and crocheted fabrics, hosiery, footwear, arts and crafts, media services, computer games publishing, and music. There are also anecdotal accounts

that in some sectors such as arts, in which Leicester has a national significance, that microbusiness formation is closer to 99 per cent¹. As such, there is concern that official data underestimates the value of smaller business activity in the local economy.

Taking these different aspects into account, whilst the most recent data available from ONS (BRES, 2016) using the DCMS definition of creative industries reveals that 10.32 per cent of local companies are creative industries, this is likely to be closer to 15-20 per cent, once a wider range of creative activities in the area have been taken into account:

- **DCMS Definition/SICs**
Drawing on the DCMS definition of creative industries (52 5-digit SICs) and using the most recent data available, in 2016, there were 2,815 creative companies in the Leicester and Leicestershire (LLEP) area, including 2,440 micro-size creative companies (0.9 FTE), accounting for 14,574 creative jobs (FTE) (NOMIS, 2017).
- **Sector Accelerator**
Recognising the narrow sector (SIC) definition of creative industries used nationally, which disadvantages smaller cities such as Leicester, a more expansive range of sub-sectors have been drawn upon to measure the extent of local creative industries (84 5-digit SICs). Using this wider definition (appendix 1), it is calculated that in 2016 there were 5010 creative companies in the Leicester and Leicestershire (LLEP) area, which accounted for 25,663 jobs (FTE) (NOMIS, 2017). When expanding the sector reach of the creative industries in this way, the creative economy shows a 75 per cent increase in creative employment, and a 78 per cent increase in creative companies. In other words, the DCMS designation of creative industries underestimates Leicestershire's creative economy by 11,019 jobs and 2,190 companies.

1 Personal communication • Made in Leicestershire Network, 2017 (subsidiary of Creative Leicestershire)

- Micro Accelerator**
 Recognising that official statistics also underestimate the true number of micro enterprises operating in the local creative economy, a 10 per cent increase in micro activities has been calculated as part of a micro accelerator. Based on local sector feedback, it is thought likely that the standard 83 per cent micro businesses is likely to exceed 90 per cent in practice, and in some sectors, between 95-99 per cent. On this basis, and assuming that creative micro enterprises have fewer than 2 FTEs, a modest estimation is that a further 4,085 businesses (including freelancers) are operating in the Leicestershire creative economy, accounting for a further 8,170 employees.
- Leicestershire Creative Industries**
 Taking into account the sector and micro accelerators, which correct for national biases in the official creative statistics detailed above, it has been estimated that in 2016/17 there were 9,090 businesses operating in Leicestershire's creative economy, employing 33,761 people (FTEs). This reflects the exclusion of several important areas of fashion and textiles, ICT and web-based media business, as well as arts, and museum and gallery activities from official DCMS (SIC 52) definitions, which are especially important for Leicester's creative economy and have been the subject of considerable growth in recent years.
- Education Accelerator**
 It has not been possible to calculate the impact of education on the local creative economy other than the addition of Cultural Education in the SIC84 designation above, adding 89 employees and 25 companies. This is unlikely to reflect the true picture in a city served by two large universities and one creative-orientated further education college, which together account for 6,630 academic staff and 66,005 students, and currently subsumed into the Education SIC codes. A reasonable supposition then is that between 2,000-4,000 students and lecturers operate as creative practitioners, using creative resources, infrastructure, and producing creative work, which has a multiplier impact as it works through the economy. This represents just 2-4 per cent of the education base in the city and excludes the University of Loughborough. A modest assumption that a quarter of these operate on a freelance basis would boost the creative economy count by a further 1,000 businesses, pushing Leicestershire's creative industries into a top 5 position nationally.
- Total Leicester Creative City**
 Working through the different calculations, a more realistic assessment of the Leicester Creative City is 34,833 jobs and 10,095 businesses, compared to the national figures of 14,644 jobs and 2,820 businesses (+20,189 jobs, +7,275 businesses).

	DCMS Definition (SIC52)		Sector Accelerator (additional SIC32)		Micro Accelerator (+10%)		LLEP Estimate (SIC84 + Micros)	
	DCMS Employment	DCMS Companies	SIC32 Employment	SIC32 Companies	Micro Employment (2FTEs)	Micro Companies	Est. Employment	Est. Businesses
Textiles, Fashion, Hosiery, Footwear	3083	460	1538	230	900	450	5521	1140
Design	1763	340	--	--	610	305	2373	645
Arts, Crafts	1407	275	112	40	560	280	2079	595
Performing Arts	501	215	--	--	410	205	911	420
Publishing	435	95	2288	260	580	290	3303	645
Media, Film, Music	5213	965	6263	1570	1340	670	12816	3205
Gaming, Software	1546	325	--	--	3370	1685	4916	2010
Architecture	626	140	--	--	260	130	886	270
Cultural Education	--	--	89	25	40	20	129	45
Museums, Galleries	70	5	729	65	100	50	829	115
+ HE/FE Accelerator							1,000	1,000
Sub-Total	14,644	2,820	11,019	2,190	8,170	4,085	34,833	10,095

TABLE 1 • LEICESTERSHIRE CREATIVE ECONOMY (2017) • Based on BRES, 2016 (NOMIS, 2017)

Leicester's Creative Ecosystem

Leicester's creative industries are located centrally within a triangle between Humberstone Road in the city centre, to De Montfort University to the west of the ring road, and the University of Leicester to the south.

More than 20 significant stakeholders operate in the Cultural Quarter around Orton Square, which acts as the principal focus for cultural and creative activities in the city. The Cultural Quarter boasts a rich architectural legacy with the presence of several listed hosiery mills, which in recent years have become favourable sites for creative design studios (fig 3). Leicester's two universities and its strong further education provision provides an important input of talent to the City's creative economy. The universities also offer innovation hubs and technical facilities, as well as key industrial research, which supplements the technical repertoire of the City's key creative sectors.

The city is well-served by office space for creative industries, including several sites of managed workspace in the Cultural Quarter to cater for different business sizes and activities, co-working facilities, wet-office and technical 'maker' spaces both in the city centre around the Cultural Quarter, Bede Island, the new Waterfront area, and to the north adjacent to the Space Centre (fig 4). As depicted in Table 2, The Leicester Creative City is well-served by public, private, and third sector organisations. Skills and business support to the creative industries is provided by traditional stakeholders such as FE and HE institutions, public-financed projects (including those funded through ERDF) and increasingly from within the industry e.g. Creative Coffee, Set the Bar, LCB Depot, The Mighty Creatives, Creative Leicestershire, Tech Start-Up Network, and sector-based maker spaces (The Leicester Print Workshop, The Clay Room, Echo Factory, The Phoenix).

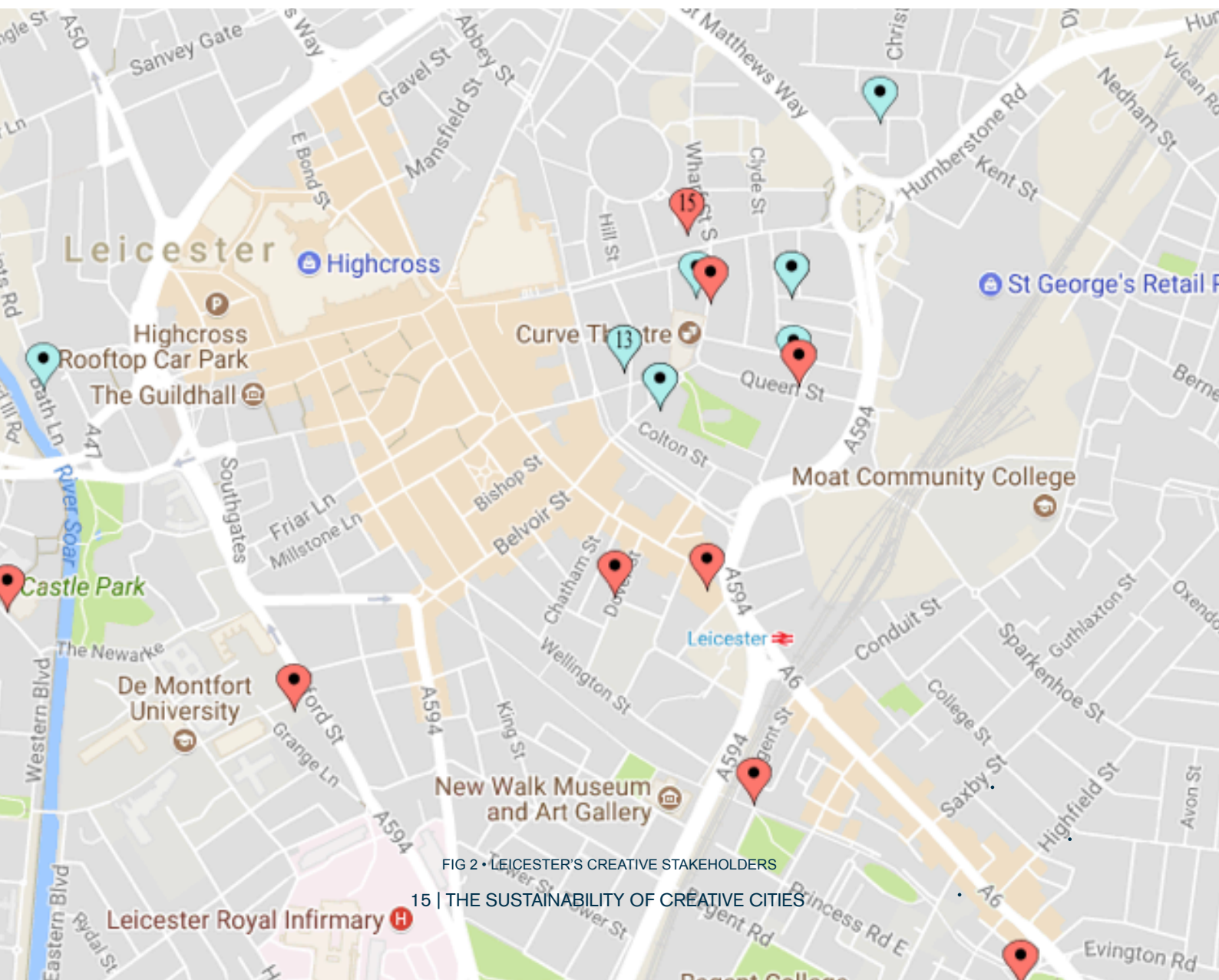


FIG 2 • LEICESTER'S CREATIVE STAKEHOLDERS

	Organisation	Function				
		Creative Practice	Research	Skills	Business Support	Network/Social Space Investment
Public Sector	Leicester & Leics LEP	x		x	x	x
	Midlands Engine Investment Fund (MEIF)					x
	Leicester City Council				x	x
	De Montfort University	x	x	x	x	x
	University of Leicester	x	x	x	x	x
	Leicester College			x	x	
	LCB Depot			x	x	
	Dock I & II			x	x	
	Makers Yard	x		x	x	
	Creative Leicestershire	x	x	x	x	
	Leicester Museums	x	x			
	DMU The Gallery	x				
	Leicester Art Clubs	x				
	De Montfort Hall	x				
	Sue Townsend Theatre	x		x		
	UoL Attenborough Arts Centre	x				
	King Richard III Centre	x				
	The Space Centre	x				
	Diwali Festival	x				x
	City Festival	x				x
	Riverside Theatre	x				x
	Innovate UK (East Midlands)					x
Private Sector	Arts and Crafts Companies (595)	x				
	Performing Arts Companies (420)	x				
	Textile and Footwear Companies (1140)	x				
	Architectural Practice (270)	x				
	Design Companies (645)	x				
	Media, Film & Music Companies (3205)	x				
	Gaming & Software Companies (2010)	x				
	Publishing & Design Companies (645)	x				
	East Midlands Chamber		x		x	x
	Friars Mill					x
	The Clay Room (Ceramic Studio Space)	x		x	x	x
	Two Queens Art Gallery/Space	x		x	x	x
	The Leicester Comedy Festival	x				x
	The Little Theatre	x				
	Haymarket Theatre	x				
	The Y Theatre	x				
	TMAL (Textile Manuf Assoc of Leics)				x	x
	MGDS (My Graphic Design School)			x		
Third Sector	Creative Coffee Leicester	x	x	x	x	x
	Set the Bar	x	x	x	x	x
	Leicester Soup				x	x
	Leicester Interchange Pro-Action Café				x	x
	The Mighty Creatives				x	x
	TEDx Leicester		x	x	x	x
	Curve Theatre	x		x		x
	The Phoenix Art Centre	x			x	x
	The Leicester Print Workshop	x	x	x	x	x
	Echo Factory	x		x		x
	Leicester Society of Artists			x		x
	Caribbean Festival	x				x
	International Music Festival	x				x
	Glastonbudget Festival	x				x
	Urban Steam Festival	x				x
	Acoustic Gardens	x				x
	Leicester Craft Centre	x		x	x	x
	Soft Touch Arts			x		
	ACE Midlands			x		x
	Cool As Leicester	x				x
	Great Central	x				x
	Leicester Business Festival					x
	Leicester Society of Artists (LSA)		x	x		x
	Leicester Sketch Club	x		x		
	Studio Ame CIC (Art Studios)	x		x	x	x
	Space.Leicester CIC (Co-work)	x	x	x	x	x
	Bring the Paint Festival	x			x	
	CVAN (Contemp Vis Artists Network)	x			x	
	Spark Arts	x		x	x	
	SEED Creative Academy		x	x		x
	Royal Society of Arts (RSA) Midlands	x				
	Made in Leicestershire	x	x	x	x	x
	Textiles Hub		x			x
	Leicestershire Craft Centre	x	x			x
	Handmade Festival	x				x
	Leicester Hackspace	x		x		x
	Tech Start-Up Network	x			x	x
	Create		x	x		x

TABLE 2 – LEICESTERSHIRE CREATIVE ECONOMY ECOSYSTEM



FIG 3 • LEICESTER'S CULTURAL QUARTER



FIG 4 • FRIARS MILL WORKSPACE, LEICESTER WATERFRONT
17 | THE SUSTAINABILITY OF CREATIVE CITIES



London

London's Creative City



London's creative economy is especially rich internationally in art and design (Evans, 2002, 2009) with strong specialisation in the arts, web-based media, and design in East London.

East London's creative economy has strong roots in Hoxton and Shoreditch's furniture industries, whose redundant warehouses in the 1980s became a home for settling visual artists and by the 1990s a nurturing ground for the YBA movement (Young British Artists). Damian Hirst, Tracey Emin, and Jay Jopling established gallery spaces in the area leading to other commercial galleries, former warehouses became exhibition spaces, and the area gained notoriety and media coverage progressively throughout the 1990s. By 1996, Time Magazine had designated Hoxton as one of 'coolest places on the planet' and by the turn of the millennium following a sustained period of public investment in dot.com and hi-tech industries, the area had become the epicentre of the new media industry, around so-called 'Tech City' - new professionals relocated there, and rising interest in the area prompted increases in property prices and global investors (see e.g. Pratt, 2009; Knox, 2012), consistent with Clay's (1979) model of gentrification.

Today, Shoreditch is renowned for its alternative lifestyle although this raises a question about whether alternative is a nebulous label designed purely for marketing, and whether this is sustainable once place appeal gives way to mainstream surges in speculative investment. To the East is Brick Lane renowned for its Anglo-Indian cuisine and also Spitalfields, a hot-spot for fashion and lifestyle with its own market, fashion boutiques, design and lifestyle, as well as distinctive bars, cafes and restaurants, which serve as a social space for local creative workers. Hoxton and Hoxton Square to the West is famed for the White Cube Gallery, visual artists, and music halls, which has spurred new gallery spaces stretching from Whitechapel to Bethnal Green Road onto the Shoreditch Triangle. The

entire area now attracts an international audience and its award-winning restaurants, independent stores, street art, bars and coffee shops, and local subculture gives it panache and international visitor appeal. In East London, creative production merges seamlessly with creative consumption, as argued later spurring creative-led gentrification.

London's Creative Census

In the UK, London acts as a primate creative city. London's creative economy is globally orientated and dominates both the London economy as well as the UK creative economy. As such, ONS produce bespoke statistics for London's creative economy, making statistic analysis easier than in other cities. In 2015, London's creative industries produced £42bn of wealth (as measured by GVA¹) compared to £89bn for the UK, having increased by 38.2 per cent since 2009. London's creative industries are successful in areas of film, TV, video, and radio; publishing; and IT, software and computer services, and in 2016 employed 622,600 workers (882,900 workers when creative jobs in other sectors are taken into consideration). Whilst the growth of creative industries in cities outside London have grown markedly over the last decade, London still retains primacy as a creative capital although it could be argued that growth is slowing comparative to other creative cities raising the question 'Is London's location as a creative city reaching saturation point?'.

¹ Gross Value Added is a measure of all goods and services produced by people in a set area and sector (less intermediate consumption)

	DCMS Definition (SIC52) BRES			Creative Definition (SIC84) BRES			LONDON GVA (SIC32) GLA	
	SIC52 Employment	SIC52 Companies	SIC52 Companies	SIC84 Employment	SIC84 Companies	SIC84 Micro	GVA (£m)	Proportion UK CI GVA
			Micro					
Textiles, Fashion, Hosiery, Footwear	11,000	1,375	1,200	13,309	1,865	1,635 (87.6%)	607	42%
Design	15,823	7420	7045	15,823	7420	7045 (44.50%)	608	42.40%
Arts, Crafts	11,774	14,507	14,435	16,247	15,665	14,915 (95.20%)	82	32.30%
Performing Arts	34,845	12,535	12,080	34,845	12,535	12,080 (96.30%)	4,173	61.20%
Publishing	47,833	3,900	1,595	66,204	4,660	2,015 (43.20%)	5,679	54.10%
Media, Film, Music	192,711	22,860	21,000	232,890	30,810	28,785 (93.40%)	8,592	49.50%
Gaming, Software	127,735	12,185	11,900	182,143	46,360	44,625 (96.20%)	15,953	44.90%
Architecture	28,495	3,770	3,300	28,495	3,770	3,300 (87.50%)	1,671	42.40%
Cultural Education	--	--	--	1,437	260	235 (90.30%)	--	--
Museums, Galleries	16,835	295	235	22,235	865	590 (68.20%)	502	27.80%
Sub-Total	487,051	78,847	72,790	613,628	124,210	115,225	42,104	47.40%

TABLE 3 –LONDON CREATIVE ECONOMY (2017) • Based on BRES, 2016 (NOMIS, 2017), GLA, 2017

While statistics relating to London's role in the UK creative economy have been published in their own right, for consistency, the same BRES data has been drawn upon for London, and used for comparative analysis with Leicester. Data has also been supplemented from the Greater London Authority (GLA, 2017) to permit analysis of GVA.

London employs around 600,000 people directly in creative industries and 800,000 in the wider creative economy (including sectors that support the creative industries). This is based on employment counts of 613,628 from BRES (Table 2), 617,000 creative occupations/623,000 jobs in creative sectors from ASHE data sets (GLA, 2017), and 882,900 jobs in the total creative economy (GLA, 2017, p13). On this basis, London's creative employment (613,628) accounts for around an eighth of the London economy (or 12.18% of the 5,136,395 total employment) and accounts for 2.27 per cent of England's employment (27,005,294). London's creative industries produce £42m of wealth as measured by Gross Value Added, which accounts

for around a half of all UK creative economy activity (47.4%) but just 0.01 per cent of London's economy (£408,478m for all sectors in London). The value of the creative industries, relative to other London sectors such as finance, real estate, and professional services is surprising, given the extent of national publicity about London's creative capabilities. In other respects, the GVA also suggests that London-based creative companies have an above national average rate of productivity and growth, relative to other UK cities and regions but not relative to other sectors. This is especially the case in gaming software (£15,953m), media, film and music (£8,592m), publishing (£5,679m), performing arts (£4,173m) and architecture (£1,671m). Since these sectors also have high rates of micro enterprises, one might deduce that these sectors are characterised by the presence of high growth new entrants (so called 'unicorns') or are dominated by a few very large companies that have a disproportionate wealth creation.

The presence of multi-nationals such as Cisco, Google, Intel, Seedcamp, Facebook/Garage, and EE in the Tech City/Silicon Roundabout area does support the idea of a few very large companies in gaming software, media, publishing, and architecture that produce above-average rates of wealth (GVA). In addition, the area around Shoreditch, Old Street, and along the Kingsland Road is now regarded as the third largest digital cluster in the world. The fact that employment growth in the creative industries here grew just 2.6 per cent during 2010-2016 (BRES) despite GVA growth of 38.2 per cent (2009-2015) (GLA, 2017) raises some questions about whether continued growth of these industries in London is realistic. In addition, the largest GVA growth (8.8%) was recorded between 2010-2011 in IT, software and computer services (GLA, 2017, p7) raising further questions about the dominance of some creative sectors in London over and above other creative activities.

Analysing London's creative industries, it is interesting to note that 91.1% of all creative economy jobs were at the manager/senior official, professional, or associate professional occupational level. Consistent with this, median hourly pay (£20.38) was almost a third higher than in non-creative areas (ASHE, 2016). However, only a third of creative jobs (35.6%) were filled by women, and 23.4 per cent filled by BAME groups, compared to 45.5 per cent and 32.9 per cent respectively in non-creative areas. This suggests that London's creative industries are comprised of largely white, male occupations.

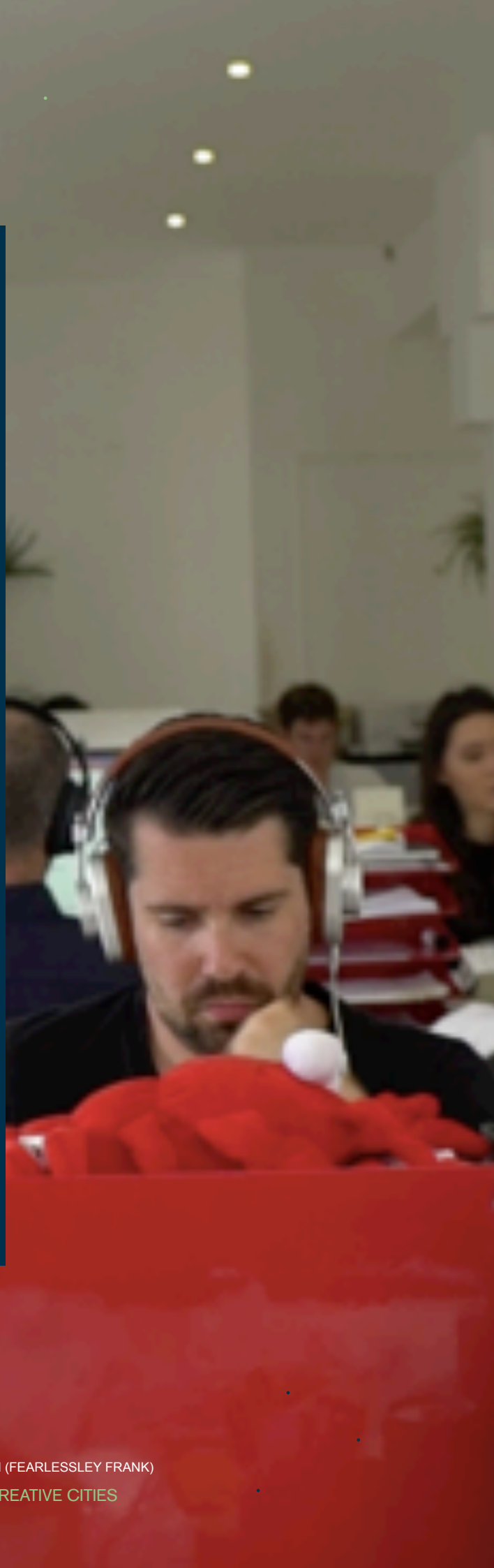


FIG 5 • CREATIVE OFFICES IN SHOREDITCH (FEARLESSLEY FRANK)

London's Creative Ecosystem

Many of London's creative industries operate in and around Shoreditch and have grown since 2000 around the 'Silicon Roundabout' (Old Street Roundabout), linking to Shoreditch High Street and the Kingsland Road. More recently, the creation of the Southwark Creative Enterprise Zone, the proactive involvement of key universities in training and enterprise schemes (e.g. Holloway, Queen Mary, Imperial, East London), and the location of key flagship developments (e.g. at Stratford) has had the effect of spreading the creative cluster and recent investments beyond the borough of Islington, into Hackney and Newham.

London acts as a key location for several national creative projects, boards and companies. These have been excluded from Table 4, as they act in the national interest rather than with a London remit. These include the BBC and other broadcasters, publishing houses and newspaper groups, major music companies and record labels, theatre and museum groups, government projects and quangos, and sector organisations (e.g. RIBA). Nevertheless, the location of these organisations do confer advantages by exerting a gravitational pull on multi-national enterprises, and are highly influential in securing key investments, which enrich the ecosystem as a whole. These include the location of Google Campus, co-working giants Seedcamp and Runway, and the location of enterprise zones, AHRC creative clusters and so on.

Looking at Table 4, London's creative ecosystem is well served by public, private, and to a lesser extent third sector organisations and networks. Public sector organisations provide key skills and investment routes, whilst the private sector provides rich spaces, investment opportunities, and entrepreneurial mindsets for new enterprise. Comparative to Leicester, the London creative ecosystem is more commercially orientated, as reflected in weaker third sector representation.

Location and Information Networks

London is portrayed frequently as a creative powerhouse, which has primacy in the UK's creative economy. As one creative worker remarks:

"Being in London or coming to London is inevitable because that's how you will meet and negotiate with clients".

Another indicates

"London is a magnet for creative people. There is an atmosphere here that is tangible and a major excitement when you get off at one of the major train stations. There's a feel to the place that is just different to other places".

In some parts of the literature, creative cities are framed in terms of "buzz" (Bathelt et al, 2004; Storper and Venables, 2004), which allude to the place-based interactions that drive creativity in scenes and can quickly give a city an inimitable edge. The presence of local buzz assumes that the boundaries of firms and other stakeholders are to some degree porous – that there is a willingness to interact, an absorptive capacity of knowledge stocks, and at least some heterogeneity in knowledge or information, which underpins the resolve to share knowledge. Yet what is revealed in communication with London-based creative workers are organisational structures and routines, and norms of behaviour that run counter to the idea of frequent interaction or 'chatter'. There is not the institutional thickness in the ecosystem (Table 4) to suggest frequent networking between organisations, and whilst East London is replete with physical space designed for networking, there is not the interoperability one would expect of internationally leading knowledge-based professional activity. It has been suggested elsewhere in the literature that "global pipelines" may be more important than local buzz, where

there is homogeneity of knowledge or interests and that this external knowledge acquisition and networking enables organisations to anchor new knowledge where there is path lock-in of skills and information (Storper and Venables, 2004), in order to drive local innovation. It is my contention that creative industries in London operate (and innovate) through Global Pipelines rather than Local Buzz, with many of the creative organisations interviewed describing interaction with overseas competitors and clients as a principal route for new knowledge acquisition. The idea of creative buzz in London is undermined by the accounts of several creative workers, which convey a hyper competitive environment in which local networking is discouraged:

"If you're based in London, you're implicitly competing against Los Angeles and New York as well as companies in any major cities in Europe or Hong Kong. London is inherently impersonal because you are always expected to be competing against people out there" (Innovation Consultant)

"Location is becoming less of a critical factor for a company like ours. 20 years ago, it was much more of a social job and there was more face-to-face. It's almost been eradicated... we're being dissuaded from spending time on the social aspect" (Illustration)



FIG 6 • WORKING AS A COMMUNITY (STUDIONAME, LEICESTER)

Several workers were asked specifically about the nature of interaction that is encouraged within co-working or co-tenanted buildings:

“Our complex is great for networking and I wish we used it more. I don’t think we get as much networking done as we would like ... At the end of the day, you come here and your priority is your company and everything else has to come second” (Software Designer)

“Our location is dictated by our image, not what we want to get out of the local area. There is a matter of perception. People are a lot more encouraged about our abilities to make sound creative judgment if we are based in a creative area. If we were up a mountain on a laptop, people wouldn’t quite believe we’re as creative as we pretend to be.” (Photography).

“Sure, the café is useful and it’s nice to sit out but who really has time for that. My work keeps me busy all day and I have a 45-minute commute, so come 6 or 7, I’d rather head home than socialise at the in-house café/bar” (Media).

Yet in Leicester, networking and interaction are themes that emerge repeatedly in conversation with creative workers and cited as a key factor for driving creative success in the city:

“Creative cities are all about people and the people of Leicester are very vibrant. There are so many benefits to being in Leicester – I wouldn’t have the same creative vibe elsewhere” (Textiles/Fashion)

“I get massive inspiration from the streets of Leicester. There’s a buzz from the city but also the people I meet” (Artist)

“Leicester has an abundance of talent but being involved in local networks – with likeminded people – gives me the inspiration and ideas I need to thrive”. (Digital Media)

“There are lots of people on hand to get advice from. Being based at the Phoenix, it’s impossible not to come into contact with other creatives. I bump into them in the café. I bump into them in the kitchen and have a catch-up. There are so many creatives in this area and you do spend time with them each day” (Design)

Changing Places

The notion of change is deeply embedded in the creative city model. Florida (2001), Landry (2001) and others use identifying motifs – the ‘creative class’, the ‘super creative core’ – to depict the upward wealth trajectories that come from buying into a creative city model. The term ‘creative city’ is also a narrative with symbolic significance as it uses language and imagery that reflects new power relations and economic wealth in a city, that can jar with existing communities. This is especially evident in Dalston, in the London Borough of Hackney, which continues to undergo rapid transformation as a result of London’s creative expansion, whilst at the same time facing mounting local resistance.

Dalston has attracted immigrants for over 100 years and during the 20th Century was a popular area for Jewish immigrants from Central Europe, replaced in the 1950s and 1960s by large Caribbean, and later Turkish and Vietnamese communities, much of which is still reflected in the local infrastructure and cuisine (e.g. the Afro-Caribbean community around Gillett Square). More recently, it has become a popular area

for Polish immigrants. In 2001, The Census of Population identified Dalston as being a ‘Multicultural Metropolitan Inner City’. The same year, the Index of Multiple Deprivation identified a tenth (12.2%) of local households there as being the most deprived in England, when measured by employment, education, housing, health and disability. By 2011, the Census of Population noted a 20 per cent increase in population, with the 25-29 age group seeing the most dramatic increase in local residence (amounting to an additional 13,000 young people in the locality). Whilst the profile of Dalston, along with the wider Borough of Hackney is of continued diversity, notable increases are in Black (23.1%), Turkish (3.6%), and Polish (9%) cohorts, and the changing faith profile from Christian and Jewish, to growing Jewish and Muslim faiths. Irish (-15%), Pakistani (-12%) and Caribbean (-8%) have fallen in both absolute and relative terms between 2001 and 2011 and are suggestive of ethnic displacement.



FIG 7 • THE SELLING-OFF OF COMMUNITY ASSETS, DALSTON (THE EASTERN CURVE GARDENS)

An alternative view of Dalston is of the aggressive masterplanning of the area, designed by major stakeholders in London (LDA, GLA, TfL, LB of Hackney), underpinned by private-led urban renewal, and presenting an opportunity to further grow the creative economy out of Shoreditch along the Kingsland Road. In 1995, The London Borough of Hackney declared the prestigious Gaumont Cinema fit for redevelopment, and in 2005 began large scale demolition of historic buildings (several Georgian buildings and historic theatres) without public consultation, making way for large scale transport and residential developments for the centre of Dalston. Despite opposition from 'Open Dalston', the compulsory purchase of the Ridley Road Market and Kingsland Shopping Centre, and more recently several Victorian pubs and the Eastern Curve Community Gardens, which are key community assets will make way for continued expansion of the Dalston Square residential complex and the proposed Cross Rail 2 developments, as well as further investment in the area from restaurant and hotel chains.

As Kate Poland on behalf of Eastern Curve Gardens in Dalston explains:

"Hackney's community gardens are a huge asset for the whole community. . . They provide informal and safe places for outdoor learning and playing. They reduce social isolation by bringing people together as well as improving the environment through providing habitats and food for wildlife. Unfortunately, these gardens are increasingly under threat of development because of the enormous pressure to build more housing. New housing is crucial but we believe community gardens are a solution to the challenges of our growing population, providing much needed shared space for people to meet, work and enjoy time together. We need to protect these green spaces for the future wellbeing of all Hackney's residents".

It is clear that key sites, which have been either proposed for development or have been demolished such as the local market and community gardens, represent key community resources for indigenous groups, whilst the residential areas of Dalston Square are aimed at an aspirational demographic, with an above average local income. Both represent competing demands for the same space. With only 28 of the 550 units available for social rented housing at the recently constructed Dalston Square, and the commercial price of a 1-bedroom flat in excess of £600,000, there are limited opportunities for the local population to access these developments. This means new developments and spaces become exclusive to a new demographic, and the commercial design of the area including coffee shops built into the public realm of Dalston Square, the arrival of new restaurants, and even hotels (Premier Inn, Dalston Lane) appeals to the spending habits of an exclusive demographic. Fuelled by a failed urban renewal model (Granger, 2010) and by private investors needing to secure high rates of return in a struggling macro economy, the creative city has provided an obvious impetus for further land use change and an incoming demographic to match higher land values. In other words, the creative city model provides both a new demand for, and supply of changing land use, which is met by private investors and legitimated by public agency. The term 'Shoreditchification' connotes this formula of state-led gentrification under the guise of creative growth and of the fragile proliferation of professionals to a new creative enclave, which signifies community destabilisation and decline.

As one creative worker in Shoreditch notes:

“I’m not native to London. I just came here because I knew that was where most of the creative jobs were. I’m still here because I’m still enjoying it and my wife and I haven’t run out of London yet. . . I used to live in Notting Hill and moved 5 years ago to Stoke Newington. In fact, the whole of our team lives either in Dalston or Stoke Newington. As our office was in Mayfair, our office location in the West End made no sense and so we brought our agency closer to home. We’re really fortunate living in a lovely part of town. Stoke Newington is very close, so I can walk here in just half an hour. It’s a part of London that’s really evolving and is right on the border of Dalston, which is undergoing enormous change. It has very exciting bars, restaurants, galleries and that sort of thing. The local snooker hall is about to be converted into an enormous arts centre with lots of art studios, so there’s a lot of good stuff going on in our particular area. There are a lot of places in London that are still down at heel so I feel privileged to be working and living in a good part of town, which prolongs our stay in London”.

Tarek Virani at Queen Mary University London (see also Virani, 2018) notes how the creative economy in London is tied to the discourse about property. His argument is that the creative economy appears to be irrevocably tied to the neoliberal models found in real estate, the public sector, and to some extent the higher education sector in the UK:

“London’s Creative industries are no longer just about the creative industries but about encompassing a number of organisations and sectors that are creating an environment ripe for creative economic growth”.

Virani acknowledges that London’s gentrification displaces local communities but also entails a super gentrification process (see Lees et al, 2008) that pushes out less affordable or smaller creative industries and workers. As he argues, whilst the innovation and technology field (digital media, software development, ICT) has taken over huge swathes of Shoreditch, Dalston, Hackney, and Mile End, the cultural field has moved to the margins and has now been displaced.



FIG 8 • DALSTON SQUARE RESIDENTIAL COMPLEX

“Without rent control, smaller properties in London will disappear and all that you will be left with is a ‘New York City’, where all you have is the big, media cluster organisations and the medium and large organisations, which have no touch with the grass roots level where the real creative and cultural juices are flowing . . . Some creative workers are being pushed out to Zones 3, 4, and 5 and beyond and reverberating outside the M25. You might even argue that London now stretches as far as Cambridgeshire or the East Midlands, with direct corridors to London, and this might become the destination for those pushed out of East London” (Virani).

A local manager also describes the onslaught of office space demanded from multi-nationals:

“Our workspace has 96 businesses and 600 employees on site. It used to be managed by private developers and was a ‘licence to print money’. We’re now self-owned and this

helps to keep costs down so that we can afford to be based in Shoreditch. We were approached recently by Amazon to buy our space, which is where Shoreditch is now heading, but we persisted and blocked that.” (Perseverance Works, Shoreditch)

Dalston then, provides a lens through which one might view the current transition of East London from multi-cultural low-income community to a creative enclave. Creative professionals bring with them changing values and consumption patterns, which when combined with new land uses for work (offices) and housing (apartments) has created a new built environment of converted warehouses, new builds, restaurants, bars, fashion boutiques, coffee shops, arts galleries, and even hotels, replacing the original local cuisine, coffee shops, barber shops, ethnic markets, and leisure facilities.



FIG 9 • CHANGING LAND USE ALONG THE KINGSLAND ROAD (RIDLEY MARKET AND THE NEW ART GALLERY)

Symbolically, even the old Truman Brewery in Spitalfields (Brick Lane); the oldest and largest brewery in London has redeveloped 10 acres of land and buildings into 'spectacular and flexible office, retail, leisure and exhibition space exclusively for the creative industries'. Whilst London's creative industries have thrived and

secured vital income and reputation for the city, has this been at the price of communities, local affordability, and quality of life? In Leicester, the feel is different but some of the same forces are at work. How might that play out in a city like Leicester that prides itself on affordability and ethnic diversity?



FIG 10 • CREATIVE ACTIVITIES ON THE FORMER TRUMAN BREWERY SITE

Affordability

In Leicester, there is not the same microcosm of creative-led gentrification that is being reported in East London. There is the unfolding presence of 'studentification' (Smith and Hubbard, 2014) most notably in Clarendon Park (Eshelby, 2015) and around Narborough Road, which signifies the

destabilisation of a community as a result of the proliferation of students in the city. The term 'Gown and Town' connotes the fragile relationship between the lifestyle and consumer patterns of incoming students and those of the existing community in which they are now resident.

Local Authority Area	2015 Value of Typical Residential Site (Per Ha)	2016 Gross Average Earnings (PA) Mean (Median)	2016 Average House Prices (average dwelling)	Ratio of Earnings to House Prices (Land Prices)
London Average	£6,017,000	--	--	--
Islington (Old Street, Stoke Newington)	£52,000,000	£47,723 (£37,982)	£587,255 (flat)	15.4 times (1369/ha)
Hackney (Shoreditch, Hoxton, Dalston)	£20,700,000	£37,200 (£34,507)	£512,476 (flat)	14.8 times (600/ha)
Tower Hamlets (Spitalfields, Mile End)	£19,000,000	£44,264 (£37,603)	£566,042 (flat)	15.05 times (505/ha)
Newham (Stratford, Mile End)	£10,250,000	£29,002 (£26,492)	£414,411 (flat)	15.6 times (387/ha)
Lambeth (Brixton)	£25,400,000	£44,085 (£34,357)	£527,443 (flat)	15.3 times (739/ha)
England Average (excluding London)	£1,958,000	--	--	--
Leicester	£2,060,000	£21,782 (£18,847)	£161,000 (flat) £192,082 (house)	8.5-10.1 times (109/ha)
England Industrial Land Value (per Ha)	£482,000	--	--	--

TABLE 5 – RESIDENTIAL LAND VALUES AND AVERAGE EARNINGS (PER HECTARE) • Calculated from DCLG (2015), ASHE (2017), Land Registry (2017)

Looking at the Government's (DCLG, 2015) land value estimates for different areas of the country, it is interesting to note that London Boroughs exceed the national average land value for residential use by some margin, whereas Leicester is below average (Table 5). Taking into account extreme outliers in London, Leicester exhibits residential land values (£2,060,000 per hectare) below the London average of £6,017,000 but marginally higher than the England average (excluding London) of £1,958,000. This reflects how many of the areas associated with East London's creative industries now command land values in excess of the London average, and also residential yields that outstrip industrial uses. These figures can be taken as an indicator of the growth potential for residential development in these areas and also a measure of that area's relative success - with land values high in and around Old Street/Silicon Roundabout (Islington) and radiating out towards Hackney, Newham, and Tower Hamlets. On the other hand, they are an indicator of the unaffordability of an area. When compared to average (median¹) earnings, East London residences and land values represent 15 times an average gross salary, whereas in Leicester an equivalent residence costs 8.5 times an average local salary. Whilst Leicester has seen one of the largest increases in population between 2001-2011 (+47,000 people), half of which occurred in the Castle ward of the city (the area housing the Cultural Quarter) there has not been the transformation of the type seen in East London.

- **Leicester's most desirable locations** the Cultural Quarter, the Waterside, Clarendon Park - have not been subject to intense land use changes and investments that usually denote (creative-led) gentrification. Whilst there are signs of an active housing market (Fig 11), the data indicates that the Cultural Quarter is performing if anything, less actively than in other parts of the city.
- **Leicester's St George Conservation Area housing the City's Cultural Quarter** is the site of many Grade II and historic buildings including hosiery, textiles, and footwear mills, which have become favourable sites for creative offices and residences. The average residential and office price reflects this growth in popularity as well as the quality of local

amenities and the historic built environment. Despite their popularity, prices increases have been modest in this area over the last decade (23.34%) and below the average price increases for the city (26.67%), and for East London (e.g. 65.32% increase in Dalston) over the same period (Land Registry, 2017).

- **The Castle Constituency (housing the Leicester Cultural Quarter)** has shown remarkable demographic continuity over the last 10-20 years. Between the 2001 and 2011, the Census of Population indicates that demographic make-up of the area continues to be predominantly Indian (55%) followed by White and White Other (37%) and African (5%) groups (CODE, 2013). Whilst the Castle Ward has also been the major destination for new people arriving in the city between 2001 and 2011 (+20%) this has not changed the economic composition of the area, which continues to languish as the 25th most deprived of 324 local authority areas in England (IMD, 2010).

1 Median earnings have been taken as a more reliable indicator of the true earnings of an area



FIG 11 • ACTIVE HOUSING MARKET, LEICESTER CULTURAL QUARTER (SOUTHAMPTON/WIMBLEDON STREET - JUNE, 2017)

Area	Current Average Value (2017)	Average Price Paid (2017)	Change - 12 Months	Change – 5 Years	Change – 10 years
LEICESTER	£226,905	£218,219	-£55 (-0.02%)	£49,159 (+27.66%)	£47,770 (+26.67%)
Rutland Street (LE1)	£129,549	£103,421	-£570 (-0.44%)	£26,838 (+26.13%)	£24,512 (+23.34%)
Queen Street (LE1)	£152,550	£200,000	-£672 (-0.44%)	£31,600 (+26.13%)	£28,861 (+23.34%)
Belvoir Street (LE1)	£110,500	£172,622	-£761 (-0.44%)	£35,756 (+26.12%)	£32,656 (+23.33%)
LONDON	£662,150	£633,137	-£21,886 (-3.2%)	£158,100 (+31.37%)	£208,289 (+45.89%)
Dalston Square/Lane (E8)	£518,421	£604,979	£4,125 (+0.826%)	£153,732 (+42.15%)	£204,828 (+65.32%)
Shoreditch High Street (E1)	£772,929	£719,004	£2,413 (+0.34%)	£209,593 (+40.83%)	£257,739 (+55.41%)
Hoxton Square (N1)	£597,957	£579,516	-£97,079 (-13.97%)	£78,279 (+15.06%)	£173,909 (+41.01%)

TABLE 6 – AVERAGE CHANGE IN RESIDENTIAL PROPERTY (2007-2017) • Based on: Land Registry (2017)

That said, in 2017, it was announced that a private investment group had purchased the landmark Grade II listed Queens Building in the heart of Leicester's Cultural Quarter for £2m and intended to transform the building into penthouse apartments and a restaurant. Whilst some have seen the development as a sign of growth in the city, others have framed the development in the language of emerging gentrification. Whilst it is true that Park Portfolio had also been the inspiration behind the previous investment of buildings in the Quarter (e.g. Foister Building, Cherub Building, Exchange Buildings, and Rutland House) the language being used in the more recent Queens Building purchase might be viewed as a qualitative shift in the direction of investment and of the potential yields from a city growing as a creative destination. One creative worker notes:

“Leicester has been on the receiving end of creative workers being pushed out of London's office and residential spaces” (Digital media), whilst a council officer comments: “Leicester welcomes growth and aims to be competitive but its key priority is always to balance opportunity with the needs of local people. I'm not sure what the proposed development adds to Leicester's Cultural Quarter and I'm not sure the Quarter is prepared for a hike in land values seen in other creative cities”.

More generally, local creative workers have drawn on the language of gentrification to frame their positive view of affordability in Leicester,

which adds to the competitiveness and appeal of Leicester as a creative city destination:

“Leicester's creative industries are doing well. London's focus is great but cities in the Midlands are able to compete with London on cost and many have satellite offices. They use lower office and staff costs to compete directly with London-based operations.” (Design)

“We used to be based in London and moved from London to Leicester to make the business financially viable. The cost savings are significant and we are only 50 minutes away by train – the same as travelling across London on the Underground. London is a saturated market, a harsher environment, and totally unaffordable” (Musician).

“There's no point in being in London; it needs to come to me. It's not affordable and it's only an hour away. I could be in London but if I did, I would have to charge more. . .” (Artist)

“Time and time again, creatives go to London and realise the road is not paved with gold. They learn their business and leave. Many come back to Leicester and realise it's not second best after all; it's about retaining more of the profit. In that sense, London is merely a right of passage for creatives”. (Public Sector Stakeholder)



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FIG 12 • THE QUEEN BUILDING, LEICESTER CULTURAL QUARTER

Reflecting on conversations with creative workers in London, the issue of affordability is presented differently in London, where it plays a central role in the life of creative workers:

“People in my peer group come to London to get what they can out of it, to do the ground work and get a reputation growing. They make the necessary contacts to start their career off but as soon as they can, they get out. People are moving down to the south coast in droves because it’s an easy commute to London for meetings and it’s a better quality of life . . . more affordable, it’s more healthy”. (Illustrator)

“London is a robust place where people are tough but they’ve sobered up in the last 5 years. They’ve become more sceptical of the rhetoric. For a while it was good with all of the buzzy trendy things but people are no longer drinking the Kool Aid¹ on that. They view these things less emotionally, more rationally now. Investors aren’t throwing money at businesses anymore and there are opportunities to be had in other cities. London’s affordable but only through a series of compromises and by being disciplined and skint. I think smaller, British cities are often underutilised. If you can earn London wages but live on a Leicester living standard, then that’s a dream. That’s what I aspire to.” (Consultant)

Community Open Access and Support?

During interviews, several workers described Leicester’s Creative City as being like a ‘community’, which along with its affordability made it an attractive pull for creative workers and businesses. Many studies have explored how businesses can rely on communities to support their business strategy, reinforce competitive advantage, and create value (see Dahlander, Frederiksen, and Rullani, 2008) and many of these aspects are evident in the comments from Leicester workers:

“There’s a real community vibe here – lots of collaboration, lots of support in the [Maker] Yard and Quarter area . . . The geography of the place and the people here helps to create a sense of community with creative neighbours. The business support available through the Creative Hub has been critical and the collaborative opportunities are amazing” (Textiles/ Fashion)

“It’s important to be in a community of artists – the business aspect and finding out about key events, opportunities and so on, makes life easier” (Artist)

“We firmly believe in supporting other local businesses in a similar position to us. It’s easy to see everyone as competition but the key to success is being open with everyone. So, where we don’t have skill sets in-house, we sub-contract business to our friends at Phoenix and the LCB Depot” (Design)

“What matters is that Leicester has a gang of people that can give me moral support, introductions, or whatever it is I need” (Digital Media).

Compare this with the insular nature of the work described in Shoreditch:

“Being where we are, it’s a bit of a drop-in centre for lots of creative souls, so in that respect, it’s a good position to be in. We’re aware of who’s here and who the competition is, but everybody is behind closed doors and there’s not a great deal of communication or cross-fertilisation between companies” (Digital media).

“It’s invigorating here but it’s also competitive, and you know, there’s not a lot of community in the creative world”. (Design)

¹ Drinking the Kool-Aid is an expression used in the United States to refer to a person who believes in a risky idea because of perceived potential high rewards. The phrase often carries a negative connotation. It can also be used to refer to accepting an idea due to popularity, peer pressure, or persuasion

Whilst these competing views of the ecosystem of creative cities raise questions about how creative growth can be secured in different cities, a point, which is discussed later on, it also raises some issues about the composition of the creative community being referred to, and of access and support. The community appears to be the source of support for creative workers in Leicester but is this support available for everybody in the city, or are some people still invisible?

The issue about whether the creative and cultural industries are under-represented by some demographic groups has been debated at length over the last decade (e.g. Hesmondhalgh and Saha, 2013) and it is not the intention to add to this here. That said, whilst there is now broad consensus that meritocracy is an important aspect of many economic sectors (Son Hing et al, 2011), this is not the case in the creative industries where it has been argued class origin, gender, and ethnicity might play an influential role (O'Brien et al, 2016; Oakley et al, 2017; Brook et al, 2018). Whilst different creative industries show significant differences in their 'openness', and different reports and data sources reveal variations, there is also agreement that overall, there is evidence of social inequalities in the creative industries and that improvements are warranted across the industry as a whole. The lack of granularity and quality data at local levels has hampered further research in this area - data is currently drawn from multiple sources and base years, using different nomenclature, and sample sizes, leaving comparative analysis by sub-regions and sectors patchy. Despite this, there have been some excellent ad hoc studies in recent years, which reveal important snapshots and these are useful in supplementing the incomplete data.

In 2017, Kate Oakley revealed an improving social inequality in London's creative industries (Oakley et al, 2017) with 60.5 per cent of males and 17 per cent of BAME individuals working in the creative industries (compared to 70% and 6% respectively in other regions) but reveals an increasing representation of what she names "upper middle class" (34.8% in London's workforce compared to 23% in other regions). Oakley's work,

which suggests an improved position in London contrasts with other earlier studies but suffers also from paucity of data. Inevitably, decisions made about data sources can produce very different sets of analysis, making spatial and longitudinal comparisons very difficult. The Census of Population, Annual Survey about Hours and Earnings (ASHE), the Labour Force Survey (LFS) and the Business Register for Employment Survey (BRES) have non-contiguous spatial boundaries, organisational units, and sample sizes, rendering cross-analysis of data problematic¹, and there is also the issue of a researcher's interpretation of key concepts. For example, whilst Oakley et al (2017) define Upper-Middle Class as socio-economic groups 1-3 (higher and lower managerial and professional occupations, plus intermediate occupations) it is arguable whether the inclusion of intermediate occupations such as clerical activities and sales (NS-SEC III) could be argued to be upper middle class. To qualify the impact of this, take London in which there is an above average representation of office and retail activities, the inclusion of intermediate occupations might serve to distort the picture as well as their conclusions that "coming from an upper middle class background offers significant advantages... in the Capital". Similarly, Brook et al (2018) define "working class social origins" as socio-economic groups 6-8 (semi-routine and routine occupations plus the unemployed) whilst DCMS (2015) draw on groups 5-8. These aspects are a matter of individual interpretation but do impact on data variation as is shown in the last 2 columns of Table 6. For that reason, the data from Table 6 has been read cautiously and any inferences drawn about improvements and enhanced mobility have been set aside.

Notwithstanding these concerns, what can be drawn overall from the data in Table 6 is an under-representation in the creative industries by female, BAME, and non-graduate groups; a point that has been acknowledged widely by national strategic stakeholders. Whilst this was not something that emerged from interviews directly in either Leicester and London, it is also true that many of the interviewees on this project fitted the White-Male-Graduate demographic, which

1 The Census of Population for example, presents data by parliamentary constituency and by residence, whereas the Annual Survey about Hours and Earnings (ASHE) organises this by workplace and counties, the Labour Force Survey by workplace, and the Business Register for Employment Survey by PAYE-only workplaces and by local authority districts. Attempting to combine these data sources will produce unreliable comparisons. There is also the issue of sample sizes (with ASHE sample 1 per cent of employee jobs, and the Labour Force Survey use a sample of 100,000 workplaces).

is common in the creative industries. Why is it then that some demographic groups continue to be underrepresented? It is particularly strange given that the student make-up of several creative faculties in universities (e.g. De Montfort University in Leicester, Queen Mary University London,

The University of East London) reveal a strong representation by many of these underrepresented groups. Why is it that some of these graduates succeed in gaining work or developing businesses in the creative industries, whilst others continue to fail?

Composition	Leicester Creative (Non-Creative)	Leicestershire Creative (Non-Creative)	London Creative (Non-Creative)	UK Creative by Workplace (Non-Creative)	UK Creative by Residence (Non-Creative)
BAME	--	--	22.40%	5.40%	2.7%-4.8% (95.2%-98.3%)
			-77.60%	-14%	
International (Born overseas)	--	--	33.50%	--	--
			-12.10%		
Gender - Male	--	--	64.40%	63.30%	86% (32%)
			-54.50%	-52.80%	
Gender - Female	--	--	35.60%	36.70%	14% (68%)
			-45.50%	-47.20%	
Gender Pay Gap	--	--	£15,000	--	£5,800
Higher Socio-Economic Groups (NS-SEC 1-4)	--	--	34.80%	92.10%	--
				-66%	
Lower Socio-Economic Groups Class (NS-SEC 6-7)	--	--	--	--	12.4% (18%)
Class Pay Gap	--	--	--	--	£23,000
Disability	--	--	--	5.6% (1%)	--
HE/Degrees	--	--	--	58.80%	--
				-31.80%	

TABLE 7 – COMPOSITION OF THE CREATIVE COMMUNITY, IN LEICESTER AND LONDON (2017)

Compiled from: DCMS (2014), DE (2017), GLA (2017), Creative Skillset 2016), ASHE (2017), O'Brien et al (2016)

Networks and Communities

Drawing on the work of Bourdieu (1986) one might question whether all demographic groups have the same ease in converting their cultural capital (culture, skills, qualifications, cultural possessions) into wealth (economic capital), and the role that their social capital (or networks) might play in this. Bourdieu's analysis that ultimately "Habitus" or cultural background and family standing might "orient actions and inclinations" (1986, p246) suggests that one's talent and skills, as well as ability to make a living from this, may be constructed and mediated by class and socio-economic standing; a point Oakley et al (2017) make in looking at parents rather than a worker's

socio-economic grouping. Several workers' discussion about the role of 'community' might also come into play here and suggest an enabling social capital in which a community supports and facilitates success, to compensate for differences in 'habitus'. In Leicester where an enabling community has been described by several workers, it might follow that underrepresented groups may succeed in Leicester where they might fail in other cities with a weak community. It also raises the obvious question about who is included and excluded from a community.



FIG 13 • SUSTAINABILITY IN THE SUPPLY CHAIN (HELEN HOWE ATELIER, LEICESTER)

In Leicester, excluded groups will be those who are not tenants of managed work spaces and co-working spaces, those who do not frequent the Cultural Quarter and are unaware of the opportunities available there, or those living and working elsewhere in the city. Recognising this possibility, the LCB Depot's introduction of "Canteen", a monthly social event (street food, bar, DJ, comedy) and "Easy Saturday" are designed to reach out to new demographics to encourage them into the creative spaces of the Quarter. The use of Caribbean street food for example at Canteen is a deliberate attempt to encourage a new demographic to the Quarter, whilst Easy Saturday is designed to capture a new demographic at an early age. As James Burkmar, the manager of the LCB notes:

"To be a great creative city you need to look globally but gear yourself locally. Be a community and draw in the best from further afield, whether that is internationally or through the municipality. It's important to bring in other seeds of talent".

In London, whilst there was less overt reference to networks and community but also where workers tended to be white males from middle class origins, it is interesting to note the ubiquitous coffee shops in and around Shoreditch, which serve as important 'open spaces' for networking of creative workers, and also for bringing in new talent. New talent in this sense might refer to those starting out in the creative industries, those working on the periphery in ancillary sectors, and those who are not currently members of office spaces and clubs. There are currently 87 coffee shops within a 5-minutes walk of Old Street Roundabout (Silicon Roundabout) and the growing use of 'open membership' at Google Campus London and Runway East for example are deliberate strategies to 'bring talent in'. In addition, several membership organisations such as The Brew, Fora, Central Working, Soho Workers, Campfire, and Shoreditch Works have dedicated managers charged with developing 'community' environments in their buildings, including

programmes for introducing external workers through leisure and learning activities. There are also strategies for encouraging members to use offices in other cities e.g. Campfire's offices in Asia; Soho Works in Los Angeles; Central Working offices in Manchester, Cambridge and Reading; and Google Campus in Berlin, Madrid, Sao Paulo, Tel Aviv, and Warsaw. As several co-working managers note this provides a crucial way of realising 'creative churn' and introducing diversity of talent and skills into a local space, with a view to stimulating new ideas and innovations. In Leicester, where a smaller proportion of creative businesses operate in managed work spaces, the sense of community throughout the Quarter is vital but also finding ways of reaching out to other parts of the city and introducing newcomers is key to sustaining vibrancy and future growth.

Helen Howe Atelier, a microbusiness based at the Makers Yard in Leicester's Cultural Quarter describes the importance of networks to her work:

"There are lots of one man businesses around here and it can be lonely. Meeting up with others can be important mentally, socially, and commercially. For example, I attended a social event organised by the New Tech Start-Up Network a few months ago, and through that was given a contact of a local person who has a sheep smallholding and produces sheep yarns. Through direct contact, we discussed using these local yarns and I found somebody else who can weave from this. By sourcing local buttons for example, I have been able to develop local supply chains to develop a new business line based on sustainability. That whole idea and new line emerged through socialising through a local network and a friend who works in IT and digital media."

Wealth, Imagery and Representation

Thinking further about the opportunities that exist for developing careers in the creative industries, it is interesting to note how Helen Howe Atelier created her business. She is one of the few interviewees who is not a graduate. She attended a Leicestershire college where she took a vocational course in fashion and textiles and decided to learn on the job through some large textiles companies. Here she learned the technical skills around tailoring but also the wider skills around buying, supply chains, and developing a viable business model. She concedes that Leicester's Business Support Team have been invaluable, especially in developing the profit margin of her business. This is a point made by three other interviewees in Leicester's Cultural Quarter who emphasise that it's easy to get drawn into the industry standard of producing work at zero profit to build a customer base, whereas this is not a viable basis for a sustainable business. There is broader resonance here with concerns made further afield that creative workers are being undervalued en masse, with significant consequences for new entrants from low or middle income groups. To what extent are the creative industries a viable career choice for all demographics?

It is interesting to note how the creative industries were developed during the New Labour period in the UK (1997-2007) and were framed initially as a mode of labour reform with pluralistic opportunities for wealth creation, but as McRobbie (2015) notes has now become a 'fine-tuned instrument for acclimatising the expanded, youthful urban middle classes to a future of work without the raft of entitlements and security gained in the post-war period'. As one creative worker notes:

"It's a hugely competitive market. The sheer numbers of people coming out of universities is terrifying...and a number of people graduating now don't have the talent to make it. Universities are giving them a false sense of security and you can get lost in the mire of mediocrity" (Illustrator).

After a brief period where new entrants to the emerging creative industries scaled the heights, Banks (2017) has expressed concern that the creative industries show that once again, we are becoming a domain of "class consolidation", and that whilst portrayed as promising opportunity

to all, the creative industries "in fact create new forms of social division" (Littler, 2017). As one creative worker reports:

"The [profit] margins can be slim, and in some cases below minimum wage. There are opportunities for reducing costs by operating as a freelancer and working flexibly in shared spaces and at home, as well as working fractional appointments in one or two organisations. However, my experience has been that organisations...employers... exploit this freelance status. I am in a situation where two employers – both public sector – are reneging on their responsibility to cover disability support for me, by in effect encouraging me to secure the support from the other employer. This has been going on for over a year. It's a precarious way to earn a living." (Archivist, Textiles).

The view for this worker is of low-paid work and liminality, and of employers evading statutory frameworks characteristic of a 'gig economy'. In that sense, whilst the skill levels and in many cases, qualifications are higher, there appear to be few differences between sweatshop conditions found in manufacturing sectors such as textiles (including those in Leicester) and the so-called gold collar work of creative industries.

Another creative worker concedes that the 'financial returns' can be varied and that the only way to make a sensible living out of the creative industries is to own a business. As he notes:

"If we're serious about growing the creative industries, we have to encourage growth of our tech talent as a profitable area, but also encourage business ownership. You've got to own the business to make a decent return" (Digital Media).

This feedback raises the question about whether some creative industries are more affluent than others and also receptive to new entrants and flexible business models. It seems unlikely that each creative industry would behave in the same way given the variety of disciplines and sub-sectors involved.

Blandford (2017) also makes the point that regardless of sector, the experience of work for the working classes can be markedly different to other demographic groups.

As he notes 'education rarely changes the outcome; the early years is the crucial time to build a successful life and career, and if one's early years are disadvantaged, then education will fail to deliver for some groups'. These ideas resonate with the feedback from three students interviewed during the project:

"I'm completing a masters in business studies but it's hard. I'm doing well but I have to keep on interrupting my studies to work jobs and pay the rent, and well... support myself. My family is based in London but they don't understand what it's like to be at university and can't support me. I've just had to turn down an opportunity to go on a study trip to North America because I'm behind with my fees and so formally excluded from university. Others on my course are completing internships this summer to get a foothold in the door. How can I compete with that, when I have to work 3 jobs just to get by?" (Afro-Caribbean Student, Artist).

"I love music, I love art. I'm a photographer and a musician. As I come towards the end of my course though, I'm worried about what I will do. I bought into the creative industries at college but I just can't see how it will work for me. I don't see people or organisations that look like me, dress like me, or speak like me. I look at strategies and promotional stuff and I don't see what I want to do and what I believe in. I don't believe now, the creative industries are for people like me or cover what I want to do, which is more street. All I keep seeing are images of preppy white people, and Harry Potter and Wallace and Gromit. That's not what I'm about and for the UK, it's hugely disappointing." (Student of West African descent).

"University was ok. I crafted my skills and that should have been enough but leaving university was hard. I left being involved in a small project and so was ahead of the game. On paper that should have been enough to make it but I haven't. I can't get a job in the industry and I can't afford to set up as a business and be taken seriously without serious investment

to buy the equipment I need. I spoke to the Princes Trust and some venture capitalists about investment and it turns out, they don't invest in people like me and backgrounds like mine. All I've got now is huge debt and the prospect of living at home for the next decade, and so 2 weeks ago I sold out and signed up with an agency for warehouse work".
(Graduate film maker).

These comments are echoed by an Asian creative worker:

"Despite all of the hype, I just don't see any 'browns' like me. The creative industries are not a career destination for my people. They don't talk my language and they don't represent me. I look at the PR of local creative projects and I don't see anybody who looks like me." (Design).

There are several issues, which emerge from these anecdotal accounts. The first relates to representation. Whilst one respondent mocks the ethnic and cultural content of policy materials in the UK – especially those produced by national agencies - two respondents make the point that the creative industries as a brand fail to reflect their own work and their own cultural backgrounds. The second point relates to support for disadvantaged groups, which may also be acute in some ethnic communities. Going to university is an increasingly expensive and arguably, exclusive endeavour, which for some groups is out-of-reach. Sustaining life at university can be equally difficult. Whilst more affluent groups might use holiday periods to build CVs and gain experience from internships that build a competitive edge, for others there is an opportunity cost from needing to work full time to pay for the next tranche of fees and rent. As Hesmondhalgh and Baker (2011) note

"For our respondents, unpaid work is inescapable, particularly in the form of the unpaid internship for those working in advertising and marketing, and in design. For those interviewees from working class backgrounds, unpaid work was seen as inescapable and a form of exploitation. Those from upper-middle class origins expressed the same weight of expectation to work for free but were more likely to describe the potential career benefits of unpaid work."

Leaving university can also be debilitating, where there is no follow-on support or transition arrangements for creative students to build businesses and buy technical equipment, and under these conditions it is easy to see how upper middle class students are more likely to succeed in entering the creative industries.

Saha (2017) makes the additional point that the production of representations of racial and ethnic minorities in film, television, music and the arts – and presumably also PR materials and policy documents - can shape wider attitudes towards some demographic groups, and this also needs to be taken into consideration. In the context of creative industries, the idea that strategies and promotional materials portray certain demographic groups, who dress in a certain way, and are engaged in cultural and creative activities serve to reinforce privilege and disadvantage. Therefore, whilst the creative industries have been framed as pluralistic and accessible to all, the realities of university, competing for jobs, as well as the circles and networks that some people are part of, shape the opportunities for accessing and succeeding in the creative industries. At the same time, image, dress, cultural experiences and backgrounds can exclude some groups from the mainstream creative industries, and differentiate them to such a degree that mainstream opportunities such as investment becomes simply out-of-reach (see Fig 17).

In Leicester, there are several examples of stakeholders working to address social disadvantage in the City's creative industries. The LCB Depot's work on widening participation in the Cultural Quarter through different leisure and social activities is an excellent starting point. De Montfort University's work on developing school voucher schemes to encourage children from disadvantaged communities to go to university is helpful, as is its Creative Residence Scheme, which provides follow-on investment for graduates to develop creative start-ups in the city. The University's recent commitment alongside Arts Council England to provide long term investment and support for cultural development in Leicester is a critical step in prioritising creative talent in children and young people, regardless of their ethnicity, gender, and socio-economic background (Creative Talent Plan). Arts Council England's Developing Creative Practice Fund (£3.6m PA)

also provides further support for practitioners to work on ambitious work including further training and networking, acknowledging that arts should be an inclusive not exclusive club, and that "this fund will support creative talent of different ages from different backgrounds...to hone their work" and to redress current inequalities in the sector (see ACE, 2017).

Creative Work as Sustainable Growth

Much has been made of the capacity for creative industries to transform cities and their local economies through economic development, leading to job growth, improved amenities and cityscapes, and an improved quality of life. Viewing creative cities through a regeneration lens in this way, investments made to develop a city's creative and cultural offer could be seen as a proactive attempt by stakeholders to improve an area to tackle real local needs. As such, the success of creative industries investment in a locality is tied up with the trickle-down of benefits from investments to local people, and in addressing the real issues of wealth, quality of life, and living standards in a city. This is especially important because success in urban renewal investments can often be displayed as improved aesthetics of an area and in some cases, job growth but where this has not made a city or local community more socially cohesive or competitive (comparative to another area), or has not performed over and above what would have been expected from a period of macroeconomic growth, then this could be deemed as an unsuccessful area of regeneration or investment. In this sense, a sustainable and competitive area that is enriched by creative investments might be understood as one in which there is an ability to continually upgrade a business environment, skill base, and physical, social and cultural infrastructure to attract and retain high-growth, innovative and profitable businesses, as well as an educated, creative, and entrepreneurial workforce that enables employment, high wages, high GVA, and low levels of inequality and social exclusion. In light of this, the project asks the critical question, do creative industries and a creative city bring about lasting change in urban decline, as imagined by urban regeneration¹?

¹ Regeneration is defined as "intervention to address need" (Granger, 2010, p8)

Whilst the statistics point to a burgeoning creative economy in the UK, which is admired nationally and internationally, and which continues to create jobs and produce national wealth, what lies behind the data regionally and sectorally? London's creative industries employ around 600,000 people (the wider creative economy employs 800,000) and is home to 125,000 companies, whilst Leicester is home to around 34,800 creative workers and 10,000 creative companies. Yet, the two cities produce very different levels of wealth from their creative activities and investments.

- **In London**, the creative industries produce £46,994m (£109,256m including culture and digital media), which equates to £76,662.31 of per capita GVA (based on an employment count of 613,628). This compares favourably to a per capita GVA for all sectors in London of £46,481.90, meaning that the creative industries generate around 40 per cent more economic wealth than the London economy overall (ONS, 2017).
- **In Leicester**, the creative industries produce per capita growth of around £4,252.87, which is based on an estimated¹ GVA figure for the creative industries of £148m and an estimated workforce of 34,800 (or £10,106.52 per head when using the official workforce figure of 14,644). When creative, cultural, and digital sectors are combined, per capita GVA increases to £12,442.52 and compares to a per capita GVA figure of £22,233 for other areas of the Leicester economy. This means that on face value the creative industries produce only 20 per cent as much wealth as other parts of the economy in Leicester, and when the creative-cultural-digital sectors are combined, they produce half as much wealth (56%) as other sectors of the economy.

Creative Incomes

Whilst there are evidently differences in success of London's and Leicester's creative city ecosystems, it is clear that in Leicester, the creative sectors (£4,252 per head) are less valuable than culture and digital sectors (£12,442 per head), but that both areas of activity are comparatively less valuable than the rest of the economy in combination (£22,233 per head). Whilst the picture is more complex than the data suggests not least because the data can mask important relational roles of the creative industries in the rest of the economy (e.g. Potts and Cunningham's (2008) assertion that creative industries can drive innovation and growth in other sectors) in simplistic terms however, it suggests a negligible role in growing the city's economy. More nuanced research on Leicester's relational networks in the creative industries, and on inter-relationships of creative sub-sectors would reveal a more accurate picture of the role that creative industries play in the city.

¹ The Creative industries GVA estimate has been calculated as 7.44% of the Region's creative industries GVA, given that Leicester's total (all sectors) GVA accounts for 7.44% of that for the entire region.

Region	Creative Industries GVA (SIC84 Creative-Culture-Digital Sectors)			Total GVA (All Sectors)		
	2010 GVA (£m)	2016 GVA (£m)	Change 2010-16 (%)	2010 GVA (£m)	2016 GVA (£m)	Change 2010-16 (%)
North East	£669	£983	47%	£44,008	£50,582	15%
	(£2,863)	(£3,794)	(32.50%)			
North West	£3,830	£5,195	35%	£139,447	£166,236	19%
	(£11,284)	(£14,136)	(25%)			
Yorkshire & Humber	£2,199	£2,572	17%	£96,088	£111,988	16.50%
	(£6,594)	(£7,237)	(9%)			
East Midlands	£1,715	£1,993	16%	£81,910	£99,903	22%
	(£5,220)	(£5,956)	(14%)			
Leicester - estimated (7.44% of region)	--	£148 (£433)	--	--	£7,745 (actual)	--
West Midlands	£2,622	£3,199	22% (16.5%)	£100,260	£126,356	26%
	(£8,135)	(£9,480)				
East	£3,741	£5,064	35.% (26%)	£118,844	£147,111	24%
	(£11,178)	(£14,081)				
London	£26,399	£46,994	78%	£308,208	£407,728	32%
	(£76,605)	(£109,256)	(43%)			
South East	£12,028	£16,041	33%	£209,974	£258,426	23%
	(£35,411)	(£44,423)	(25%)			
South West	£3,193	£4,055	27%	£106,195	£127,138	20%
	(£8,906)	(£10,323)	(16%)			
Wales	£812	£1,056	30%	£48,182	£59,475	23%
	(£2,888)	(£3,595)	(24%)			
Scotland	£2,489	£3,664	47%	£110,321	£133,792	21%
	(£7,920)	(£10,197)	(29%)			
Northern Ireland	£727	£1,012	39%	£31,284	£37,169	19%
	(£1,985)	(£2,608)	(31%)			
UK Total	£63,425	£91,828	45%	£1,422,028	£1,744,435	22.60%
	(£178,992)	(£235,088)	(31%)			

TABLE 8 – CREATIVE WEALTH, BY REGION (GVA 2010-2016) • Based on: DCMS (2016)/ONS (2017)

In terms of regenerating the city, the data suggests that Leicester's creative industries would not on their own grow the city economy, other than acting as a brand and offering local people who live, work, and learn in Leicester a very rich and diverse creative and cultural offering.

Why is it that the creative industries are valuable to the local economy in London but are less valuable in Leicester? The answer lies in large part in the sector make-up of Leicester's creative city. Whilst often treated as an amorphous term, the creative industries comprise around 21 different sets of activities – more when specific occupations are taken into account. As Table

9 demonstrates, different sectors pay different salaries, and different sectors have performed more and less well over the last 5 years. Whilst salaries in film, TV, video and radio pay the most (£21.77 per hour), followed by IT, software and computer services (£21.59 an hour) and publishing (£20.08), only IT is well-represented in Leicester. Indeed, Leicester has an above-average location of textiles and crafts (£15.34), design (£15.34), visual and performing arts (£15.71), and museums and galleries (£15.71), which have some of the lowest hourly pay of all creative industries. Compare this to the well-paid areas of film and TV; IT and software; advertising and marketing; and publishing in London.

Sector	Hourly Pay						Change 2011-16
	2011	2012	2013	2014	2015	2016	
Advertising & Marketing	£17.95	£19.06	£17.59	£18.36	£18.57	£19.65	9.50%
Architecture	£17.20	£16.49	£16.86	£16.30	£15.72	£17.16	-0.20%
Crafts	£14.37	£14.82	£14.13	£15.17	£16.43	£15.34	6.80%
Music, Performing & Visual Arts	£13.56	£13.82	£13.56	£15.33	£15.78	£15.71	15.90%
Design (product, graphic, fashion)	£14.37	£14.82	£14.13	£15.17	£16.43	£15.34	6.80%
Film, TV, Video, Radio & Photography	£18.97	£17.71	£19.16	£19.16	£19.34	£21.77	14.80%
IT, Software & Computer Services	£21.50	£20.03	£20.97	£19.14	£19.17	£21.59	0.40%
Publishing	£19.03	£19.26	£19.55	£18.39	£18.62	£20.08	5.50%
Museums, Galleries & Libraries	£13.56	£13.82	£13.56	£15.33	£15.78	£15.71	15.90%

TABLE 9 – HOURLY RATES OF PAY, BY CREATIVE SUB-SECTOR (2011-2016¹) • Source: ASHE (2017)

As noted in Table 10, Leicester's creative city is disadvantaged by its specialisation in low-paid areas of creative activity and also by significant geographic and gender disparities in pay ('City Pay Gap' and 'Gender Pay Gap'). This is especially pronounced in areas of textiles, fashion, hosiery, and footwear; and in design; arts and crafts; and museums, galleries and libraries; in other words, economic activities in which Leicester has an above-average specialisation (or locational quotient exceeding 1). To put this in context, Leicester appears to suffer from a type of spatial occupational segregation in the creative industries, in which local residents are engaged principally in under-valued creative activities. On this basis, it could be argued that Leicester's creative industries will be unable to improve local wages and income, and to tackle existing social

inequalities in isolation. This is especially bad news for a city with social and ethnic polarisation, with one of the worst multiple deprivation in the country (Index of Multiple Deprivation, 2015), and means that for 'many thousands of Leicester's citizens, paid work offers no escape from poverty' (Davies, 2017).

That said, there are some notable points that warrant further discussion. Media, film and music have a relatively low gender pay gap (-3.5%) and gaming and software, and also architecture have an above national-average salary (+25.28 and +24.34% respectively). This implies that a more proactive re-structuring of Leicester's Creative City to favourable sectors and occupations may produce more positive economic returns in the longer term.

Sector	Hourly Pay	Pay Change (2011-16)	Gender Pay Gap (%) ¹	Regional Pay Gap (%)	Leicester (LLEP) LQ ²	London (LEP) LQ
Textiles, Fashion, Hosiery, Footwear	£15.34	6.80%	-21.8/-49.4	-10.4/-32.1	2.9-10.9	0.06-0.34
Design	£15.34	6.80%	--	-26.49	3	1.03
Arts, Crafts	£15.34	6.80%	-32	--	0.5-10.18	0.7-1.1
Performing Arts	£15.71	15.90%	--	--	0.55	1.44
Publishing	£20.08	5.50%	-70.3	-53.09	0.25	1.5
Media, Film, Music	£21.77	14.80%	-3.5/-4.4	-10.96	0.12-0.3	1.78-2.56
Gaming, Software	£21.59	0.40%	-24.11/-30.52	+6.87/25.28	0.11-0.85	1.03-2.18
Architecture	£17.16	-0.20%	-15.15	24.34	0.78	1.34
Cultural Education	--	1%	--	--	1.26	0.82
Museums, Galleries, Libraries	£15.71	15.90%	-1.62	-10.7	0.78-1.41	1.2-1.26

TABLE 10 – INDUSTRIAL SPECIALISATION AND LOCATION QUOTIENTS, BY CREATIVE SUB-SECTOR (2017)
Based on: ASHE (2017), BRES (2017)

¹ Nominal Wages. Figures are for employee adult rates of pay, with no overtime or absences

Creative Work as Local Talent, Vibrancy and Third Space

At several points during interviews and also commonplace in policy and academic literature, the growth potential of creative industries is framed in terms of the talent of creative workers. In East London, several universities are located within close proximity of the creative (tech) cluster and have played significant roles in growing the creative industries out of Shoreditch. Other universities have been quick to recognise and exhort the benefits of the East London cluster by co-locating London-based campuses and smaller satellite offices either in Shoreditch or in nearby Stratford. Several universities have also opened innovation hubs nearby to encourage student-led enterprise and spin-outs and have specific career programmes orientated to the creative industries which have both routes-in and routes-out of the cluster. A smaller number of universities have also been proactive in developing new initiatives that align with capital investments and enterprise activity within the cluster such as Tech City and Google Campus.

Whilst there is not the same degree of activity in the Leicester ecosystem, there is nevertheless acknowledgement of the value of university students:

“Leicester has two great universities and that brings primarily talent more than anything else, and the opportunities from that are immense. I don’t think I would have bothered doing what I have done in the city if the raw materials weren’t there” (Digital Media).

By viewing the creative city as an urban innovation system, one is able to view the role of creative talent and especially students in a creative city in different ways. In a so-called Science Technology Investment (STI) view of a creative city, it can be argued that innovation and growth comes from R&D activities, or the capital investments in research that work their way through the economy. In this view of a creative city, investment in new technology and innovation underpins economic growth and competitiveness of the city, and the key priority is to ensure a suitable match of highly skilled (technical) labour to anchor new technologies to the local area. In other words, success is predicated on securing highly skilled labour as much as is it capital investment. In a Doing-Using-Interacting (DUI) view of a creative city, the emphasis is on the interplay or “traded and untraded interdependencies” (Storper, 1995) of skills and “symbolic knowledge” (Coenen and Asheim, 2005) that enables cross-fertilisation and the emergence of new ideas. In this view of a creative city, the importance of buzz and local networks, which bring in new skills and talent is pivotal to future growth.

1 Pay Gaps calculated from ASHE (2017) – see Appendix 5

2 Locational Quotients calculated from BRES (2017) – See Appendix 4

In London, in which it has been argued there is a more commercial ecosystem (Table 4) and comparatively richer orientation to investment (e.g. Tech City, Southwark Enterprise Zone, Google Campus, venture capitalists), of importance is to ensure a presence of highly skilled workers (e.g. directly from universities) that can work on research and new developments. The importance of buzz is secondary. In Leicester, in which there is a weaker ecosystem of investment in creative industries, of key importance is to create a vibrant ecosystem, with sufficient buzz and creative churn to sustain new creative development and prevent lock-in of existing skills and ideas. Without the same capital investments in R&D, such cities must harness new skills and ideas through the retention of students and young people in a city ('stayers') and by creating the type of vibrancy and creative churn as well as the job opportunities that appeal to 'incomers'. In this respect, Leicester's current image as an affordable and friendly city with a strong creative community is a useful basis from which to grow a sustainable creative city but as one interviewee notes:

**"Leicester has done well in recent years but we need to do so much more as a creative city to be nationally credible."
(Performing Arts).**

On the other hand, Leicester's low wages, its creative occupational segregation (the wrong creative industries!), as well as its modest retail and cultural offer provide some barriers for student retention and new graduates or incomers (Table 11), which raise some concern for the sustainability of its creative city ecosystem.

The Centre for Cities (Swinney and Williams, 2016) argues that the majority of UK cities, other than London, do experience a graduate 'brain drain'. London is not only more attractive to new graduates but is especially attractive to high achievers. London accounts for 19 per cent of all jobs, employs 22 per cent of all new graduates, and 38 per cent of those working have a first class or upper second class degree from a Russell Group University. This is especially useful for London whose STI approach to innovation requires a highly skilled labour force to anchor new R&D to the local economy.

It is not that cities outside London do not retain graduates but that they do not retain the majority of students that move to their city to study – in other words they lose their talent to other cities and countries (see also HECSU, 2015). Meanwhile, other leading cities such as Manchester and Birmingham experience inflows of undergraduate students but then see outflows aged 22 and above (reflected in Table 11's "Stayers"). Leicester performs a little better than both Birmingham and Manchester but overall performs average nationally in terms of both student retention and as a destination for graduates/incomers. To put this in context, a 5 per cent upswing of student retention in Leicester would amount to c. 6,600 additional skilled workers staying in the city each year, and contributing on average £146.7m of wealth (6,600 * average GVA of £22,233). If each local university and Leicester College each retained 250 students, this would produce c.£22m of wealth each year to the local economy, and add to the vibrancy of the creative city ecosystem.

City	GVA (per Capita)	Digital Media/ Software (LQ)	Student Retention HESA 2013-14	
			Stayer	Incomer
Milton Keynes	£46,780	0.33-1.09	6.60%	21.50%
London	£46,481	0.85-2.18	12.40%	35.60%
Oxford	£41,848	0.14-1.43	6.60%	21.50%
Edinburgh	£39,321	--	6.20%	5.10%
Manchester	£33,573	0.63-1.04	12.20%	8.60%
Glasgow	£33,120	--	6.20%	5.10%
Bristol	£31,513	0.713-1.36	13.90%	16.20%
Exeter	£31,446	0.22-1.22	13.90%	16.20%
Cambridge	£29,343	1.42-3.05	6.60%	21.50%
Cardiff	£27,480	--	12.20%	7.40%
Nottingham	£27,393	0.9-1.2	15.20%	14.90%
Derby	£27,212	0.9-1.2	15.20%	14.90%
Portsmouth	£26,263	0.43-0.93	10.50%	20.70%
Newcastle	£26,317	0.71-1.22	12.20%	8.60%
Brighton	£25,407	0.94-2.09	10.50%	20.70%
Dundee	£24,104	--	6.20%	5.10%
Liverpool	£23,389	0.888-1.26	12.20%	8.60%
Coventry	£23,192	1.34-5.75	9.70%	13.90%
Birmingham	£22,871	0.70-1.52	9.70%	13.90%
Leicester	£22,233	0.117-0.853	15.20%	14.90%
Bournemouth	£20,971	0.618-0.763	10.50%	20.70%
Sheffield	£19,870	0.24-0.96	18.30%	10.90%

TABLE 11 – PER CAPITA GVA, BY CITY (2017) • Based on: BRES (2017) and HESA (2014)

Whilst Leicester's festivals help to boost the vibrancy and appeal of the city e.g. Bring Your Paint Festival 2017, which saw graffiti artists from all over the world come to create pop-up art all over the city, more could be done to create a vibrant cultural quarter with wide appeal to graduates whilst also creating the type of infrastructure that is propitious in nurturing new knowledge and skills. In Leicester, considerable emphasis is placed on public sector provision

and the largest stakeholders creating suitable spaces and initiatives, creating a monoculture of creative and cultural activity. In other cities there is a richness of private sector provision in spaces, co-working areas, and 'third spaces', with competition driving the standard of local provision and activities.



FIG 14 – IS LEICESTER'S CITY SUFFICIENTLY VIBRANT TO INCOMERS AND STAYERS?

“Richard III helped put us on an international map and some may say our football and sporting successes are helping to add Leicester as part of the consciousness outside of the city but we’ve got to continue to grow from that.”
(Performing Arts).

“The Cultural Quarter used to be a dump but regeneration work has made it good. The footfall is better and bars make it a great place to be” (Design).

Is creativity necessarily great?



Beyond the Rhetoric of the Creative City

For nearly two decades now, cities around the world have been toying with the creative city model and grappling with what it means to be a creative city. From the view point of two very different creative cities, this study and report examines what the dynamic value of creative industries are from both an economic and social perspective, and questions whether creative cities are inevitably great.

In London, where the creative industries produce twice as much wealth as other parts of the economy, the creative city acts as an important beacon for creative success; leveraging in vital investments (including FDI), anchoring internationally skilled workers, and acting as a gravitational pull on national and international stakeholders. Being located in London as a creative brand or agency has as much kudos as the creative work that is being produced there. London is portrayed as competitive ecosystem, in which newcomers must compete with other workers and businesses, and vie for clients and investors. Creative workers flock to London to develop their careers: some leave being unable to secure a foothold; others develop their skills and contacts and then leave in search of a better quality of life; and some succeed and enjoy the fruits of their labour in the Capital. Whilst the London creative ecosystem is in every economic respect successful, the data also points to important sector variations and a slowing growth overall. Whilst there is very high wealth creation in gaming software, media and film, and to some extent publishing, and consistent with the 'tech cluster' image of East London, there is less wealth being produced in other creative industries comparative to the picture in other British cities. Whilst there has been 8.8 per cent growth in IT and software, this has been 'jobless' growth – jobs have expanded in London's creative ecosystem

by just 2.26 per cent in the 7 years up to 2017, whereas growth in other creative cities has been more extensive. Might the London cluster be reaching saturation point?

At the same time, whilst London's economic success from its creative industries are undisputed, the creative forces unleashed from its tech cluster in and around Shoreditch are creating powerful forces, which local communities are unable to halt. The creative city with its epicentre in Shoreditch is unfurling into neighbouring boroughs, wreaking havoc on the social fabric of the capital, where gentrification is now firmly entrenched in the demographic and physical transformation of the local area. Such changes, creative-led, are destabilising communities and forming creative enclaves and monocultures. From this perspective, it is hard to see how the creative industries model has regenerated East London and helped local people out of structural decline, let alone how this can be a sustainable form.

In Leicester, creative workers seem more optimistic and upbeat. Leicester is portrayed as an open creative ecosystem, in which newcomers are welcomed and can be supported. Several are 'incomers' or 'returners' to the city, having left the high-cost environment of London. There is more evidence of economic stability in Leicester's creative ecosystem (including gentrification) but there is also a sense of broken promises. In the quest to be a creative city, there have been important investments in Leicester's creative ecosystem but economically, the creative model does not offer anything new to remedy Leicester's low-skill-low-pay economy. There is some evidence that the creative occupational segregation of Leicester's ecosystem may actually be harmful to the per capita wealth of the local population and in tackling local social inequalities.

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FIG 15 – CREATIVITY IS GREAT CAMPAIGN, UK GOVERNMENT

The wealth potential from Leicester's creative industries also rests on its ability to move into higher returns (e.g. through business ownership, and higher value creative occupations), as well as its ability to create a vibrant ecosystem from which new creative products and service will emerge.

Yet, there is more that needs to be done to enhance the Leicester's monoculture of provision and activities, and to create the appeal and churn of talent and workers that might rival London and other leading creative cities.

Equity

At the start of the project and report, we asked ‘can anyone participate in a creative city and succeed through their creative and social capital’? In answer to this, we find that in the literature much is made of the openness of creative industries, which are framed as opportunities for all. In practice however, some critics have noted the predominance of the upper middle class in the creative industries (see Oakley et al, 2017; Hesmondhalgh and Baker, 2011), which are supported by findings from this research which uncovers some demographic groups being ‘priced’ out of entry to the creative industries. It can be tough to penetrate the creative industries in cities like London, which is hyper competitive, and where creative workers come en masse to establish their career. Inevitably the London brand means that supply exceeds demand for workers. Accommodation is expensive and gaining a competitive edge by working at zero profit or by taking unpaid internships can disadvantage lower-income groups. Finding ways to provide financial support to level the playing field or targeting positive action is needed to improve the equity aspect of the creative industries.

Some interviewees also noted the feel of creative industries and the mainstream creative industries brand, often displayed in publicity, which struggled to represent some ethnic groups. Drawing on literature about the importance of ethnic representation in media, it is argued that displays of creative activity including stereotypical creative workers – through film, media, and other promotional activity – reflect the broad ethnic and sectoral composition of the creative industries to maximise entry from a wide socio-economic and ethnic background, but also to ensure sustainable growth of a wide range of creative activities.

Value

London is portrayed frequently as a creative powerhouse, which has primacy in the UK’s creative industries and in many respects epitomises the model of a ‘creative city’. This is an image reinforced through UK policy-making and media activity. By contrast, Leicester has a creative ecosystem, which frequently is overlooked by major stakeholders and belies its modest performance. The Office for National Statistics (e.g. BRES) reinforces this image, and the richness and extent of Leicester’s creative ecosystem is often lost in official statistical and policy accounts, which position other creative cities as national leaders. Yet, the picture in Leicester is of a creative city expanding year-on-year, with a valuable set of creative activities enmeshed into several key areas of activity in the city. Whilst the ONS suggest that there are 14,644 creative workers (and 2820 businesses) in Leicester, a more realistic estimate is 34,833 creative workers (and 10,095 businesses) given the local importance of ancillary creative sub-sectors, the size of creative activities in local universities and colleges of further education, and the importance of local microbusinesses and freelance activities, which fall below the radar of official statistics.

Looking at the value of Leicester’s creative ecosystem, it could be argued that the benefits of the creative industries are symbolic to the city rather than economic. This is because in considering the economic wealth produced by creative activities in the city, there is insufficient evidence to suggest that creative industries raise the wealth of the city or the income levels of people living and working there. With an estimated per capital GVA figure of £4,252.87 (£10,106.52 with culture and digital media combined), it could be argued that the creative city does not offer a viable model for economic regeneration in Leicester, relative to its existing service and manufacturing base. This is compounded by evidence of precarious working conditions of some creative workers, which reinforces the idea of liminality in the creative industries, and also reinforces class and ethnic divisions found in other creative cities. In combination, this might be taken to infer limited opportunities for social mobility from some ethnic and socio-economic groups, without further assistance.



FIG 16 • GRAFFITI AND URBAN PHOTOGRAPHY AS A CREATIVE ACTIVITY?

Leicester's creative occupational segregation, which also encompasses a gender and city pay gap, renders its creative economy in the low-performing range nationally. Whilst there has been some analysis of employment by sub-sector, the full picture about how these operate and interrelate, and the impact of some over others in the local economy has not been possible due to

the paucity of data. More nuanced data, especially on relational networks in the ecosystem, would reveal more about the dynamic economic value of the creative industries in Leicester, especially its role in supporting other wealth generation in the city.

In economic terms, Leicester's creative city does not stand out as being exclusive as a growth model. Unlike London's creative ecosystem in which creative activities generate more wealth than other economic sectors, Leicester needs to find ways to increase wealth creation from its creative economy, including growth of higher-value creative occupations and sub-sectors (e.g. digital media), growth of supporting professional services (e.g. business consultancy, accountancy), and greater businesses ownership (to retain more value within the city).

Designing propitious infrastructure to support 'Doing-Using-Interacting' activities in the city and to support a DUI approach to innovation would also yield economic benefits in the longer term. In practice, this might translate as a richer and more diverse set of shared social spaces and networking activities to support cross-fertilisation of knowledge and skills, and to anchor this to the local economy. Unlike in London in which a Science-Technology-Investment model is pursued and formal knowledge transfer between university and industry is encouraged, in Leicester it is likely that greater growth will emerge through multiplex interactions from a variety of stakeholders occurring in shared spaces, and that retaining greater talent through e.g. students, would add to the creative churn of the city.

Beyond this, the city might also look to retain more wealth and value within the city economy by encouraging 'traded interdependencies' between creative and other sectors in the local economy, building a complex web of interactions (or a sticky cluster) that embeds into the local economy.

"Just looking to do paid work for someone and make other people rich is ok but people need to build their own products and their services, and sell them worldwide" (Digital Media).

Although Leicester is a socially and culturally diverse city, it is facing challenges in terms of its structural transformation. Having witnessed the loss of manufacturing (including textiles) throughout the 1980s, it has struggled to find its place in a post-industrial economy. Recent successes from the discovery of Richard III and more recently the premiership football win in 2016 have given the city confidence and a platform for re-imaging and carrying out change but its new found confidence buoyed by cultural and creative industries sit perilously with the realities of urban renewal, the impact of sustained austerity, and impending BREXIT, the uncertainties of which act as constraints in realising full growth.

"I believe Curve as a state-of-the-art building, plays a key role in both the look and feel of Leicester . . . every time we take work out of this building, we not only take the brand of Curve, we take the brand of Leicester to other cities and countries . . . we've got to continue to grow from that"
(Chris Stafford, CEO Curve)



FIG 17 • FOR WHOM THE CREATIVE CITY? DALSTON LANE, HACKNEY

A quarter (23%) of Leicester's neighbourhoods (super output areas) are in the worst 10 per cent (most deprived) areas in England as measured by the 2015 Index of Multiple Deprivation. On average, Leicester is located within the worst 4 per cent of local authority areas nationally (ranked 14th out of 326 local authority districts). This is particularly poor on aspects of income (within the worst i.e. most deprived 4.6% of national areas) and education and skills (worst 3.3% of deprived areas). Deprivation can of course reflect complex and deep-rooted, and in many respects 'wicked' problems (see Peel and Lloyd, 2017) that are not easy to solve through short-term regeneration

efforts or growth/distribution efforts, and in Leicester are masked by the wider LEP area (including whole of more affluent Leicestershire) where IMD is ranked 23rd out of 39. In this sense, whilst it could be argued that Leicester's creative city is on the one hand held back by the low skill base of the city, it could also be argued that its 'Brain Drain', coupled with the low wealth opportunities of its creative activities does little to offer a route out of decline felt across the city. Do creative cities offer anything more than changing landscapes and new coffee shops and exclusive amenities?

Sustainability

The research reveals an economically successful creative ecosystem in East London but at what cost? Beyond the prestige and glossy aesthetics, it is unclear whether the longer term plans for London's creative economy will be beneficial for local communities. From an analysis of sector performance, there is some evidence of slowing growth in London's creative sectors outside of IT and software, and of a possible saturation in London's creative ecosystem. Might affordability be beginning to undermine the competitiveness and viability of London's creative powerhouse? In other respects, it reveals the dominance of creative industries in East London, and of the effects of creative-led gentrification working through East London communities in Islington, Hackney, and Tower Hamlets. Unaffordable housing, changing land use towards exclusive residential complexes, and of exclusive retail and leisure serves to destabilise an existing community. Mounting evidence of a 'tech-led gentrification', which renders East London unaffordable to workers or sectors outside IT and software is unlikely to realise the long-term ambitions of a city, and introduce new problems that undermine longer-term sustainability. In East London, the forces being unleashed by the tech cluster are leading to what Currid-Halkett (2017, p173) terms elsewhere the "demotic turn in stardom" of the creative industries (p173).

There is an inherent danger in the mainstreaming of the Shoreditch brand, which should serve as a salutary reminder for other emerging and ambitious creative cities. East London's creative ecosystem is so widely known and internationally revered that everybody now wants to become a 'Shoreditch' and to mirror the playfulness of the creative industries, which epitomises the local area. And yet, what the research uncovered in East London was a hyper competitive working environment in East London's creative cluster, in which socialisation was discouraged through organisational norms and routines, and where affordability prevented workers from consuming or living in the same creative spaces in which they

worked. The idea that creative workers produce and consume culture and creativity in creative locales such as Hoxton, Shoreditch, Mile End, and Hackney Wick runs counter to the East London model, where many workers live outside London or commute over long distances each day. The realities of gentrification and corporate competition can be less sanguine, and the transmuting of activities and areas into a creative brand suggests a need for an overhaul of current thinking in this area.

Through this study, Shoreditch is presented as nothing more than a byword for neoliberal models of urban renewal, labour exploitation, and unaffordable living, which disenfranchises the neediest in society. In that respect, whilst Leicester's creative city underperforms in economic terms to London's creative cluster, it represents a more sustainable and cohesive basis for developing the city in future years.



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Appendices

Appendix 1

Defining the Creative Industries

DCMS – Defining the Creative Industries
Standard Industrial Classifications (SICs) 52 + 32

What's included?	What's excluded?
14110 : Manufacture of leather clothes	13100 : Preparation and spinning of textile fibres
14120 : Manufacture of workwear	13200 : Weaving of textiles
14131 : Manufacture of men's outerwear, other than leather clothes and workwear	13300 : Finishing of textiles
14132 : Manufacture of women's outerwear, other than leather clothes and workwear	13910 : Manufacture of knitted and crocheted fabrics
14141 : Manufacture of men's underwear	13921 : Manufacture of soft furnishings
14142 : Manufacture of women's underwear	13922 : Manufacture of canvas goods, sacks etc
14190 : Manufacture of other wearing apparel and accessories	13923 : Manufacture of household textiles (other than soft furnishings of 13921)
14200 : Manufacture of articles of fur	13931 : Manufacture of woven or tufted carpets and rugs
14310 : Manufacture of knitted and crocheted hosiery	13939 : Manufacture of carpets and rugs (other than woven or tufted) nec
14390 : Manufacture of other knitted and crocheted apparel	13940 : Manufacture of cordage, rope, twine and netting
15120 : Manufacture of luggage, handbags and the like, saddlery and harness	13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel
15200 : Manufacture of footwear	13960 : Manufacture of other technical and industrial textiles
18110 : Printing of newspapers	13990 : Manufacture of other textiles nec
18130 : Pre-press and pre-media services	18129 : Printing (other than printing of newspapers and printing on labels and tags) nec
18201 : Reproduction of sound recording	23410 : Manufacture of ceramic household and ornamental articles
18202 : Reproduction of video recording	32120 : Manufacture of jewellery and related articles
18203 : Reproduction of computer media	32130 : Manufacture of imitation jewellery and related articles
47789 : Other retail sale of new goods in specialised stores (other than by opticians or commercial art galleries)	32401 : Manufacture of professional and arcade games and toys
58110 : Book publishing	47781 : Retail sale in commercial art galleries
58130 : Publishing of newspapers	58190 : Other publishing activities
58141 : Publishing of learned journals	61100 : Wired telecommunications activities
58142 : Publishing of consumer, business and professional journals and periodicals	61200 : Wireless telecommunications activities
58210 : Publishing of computer games	61900 : Other telecommunications activities
58290 : Other software publishing	62020 : Computer consultancy activities
59111 : Motion picture production activities	62090 : Other information technology and computer service activities
59112 : Video production activities	63120 : Web portals
59113 : Television programme production activities	85520 : Cultural education

59120 : Motion picture, video and television programme post-production activities	91011 : Library activities
59131 : Motion picture distribution activities	91012 : Archive activities
59132 : Video distribution activities	91020 : Museum activities
59133 : Television programme distribution activities	91030 : Operation of historical sites and buildings and similar visitor attractions
59140 : Motion picture projection activities	
59200 : Sound recording and music publishing activities	
60100 : Radio broadcasting	
60200 : Television programming and broadcasting activities	
62011 : Ready-made interactive leisure and entertainment software development	
62012 : Business and domestic software development	
63910 : News agency activities	
71111 : Architectural activities	
73110 : Advertising agencies	
73120 : Media representation	
74100 : Specialised design activities	
74201 : Portrait photographic activities	
74202 : Other specialist photography (not including portrait photography)	
74203 : Film processing	
74209 : Other photographic activities (not including portrait and other specialist photography and film processing)	
78101 : Motion picture, television and other theatrical casting	
78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting)	
90010 : Performing arts	
90020 : Support activities to performing arts	
90030 : Artistic creation	
90040 : Operation of arts facilities	

SOC Code (Creative Intensity)	Occupation
1132 x (43%)	Marketing and Sales Directors
1134 (50%)	Advertising and Public Relations Managers
1112 (29%)	Directors and Chief Executives
2126	Design and Development Engineers
2131x (53%)	IT Strategy and Planning Professionals
2135x	IT Business Analysts, Architects and System Designers
2136x	Programme and Software Development Professionals
2137x	Web Design and Development Professionals
2139x	IT and Telecommunication Professionals
2431 (75%)	Architects
2432 (51%)	Town Planners
3132	Architectural Technologists and Town Planning Technicians
2435x	Chartered Architectural Technologists
2451x (1%)	Librarians
2452x (5%)	Archivists and Curators
2471x	Journalists, Editors, and Periodical Editors
2472x	PR Professionals
2473x	Advertising Accounts Managers and Creative Directors
3121x (56%)	Architectural and Town Planning Technicians
3122 (14%)	Draughtpersons
3411 (82%)	Artists
3412 (74%)	Authors, Writers, Translators
3413 (46%)	Actors, Entertainers
3414 (0%)	Dancers and Choreographers
3415 (59%)	Musicians
3416	Arts Officers, Producers, Directors
3421 (64%)	Graphic Designers
3422 (56%)	Product, Clothing and Related Designers
3431 (78%)	Journalists, Newspaper and Periodical Editors
3432 (89%)	Broadcasting Associate Professionals
3433 (36%)	Public Relations Officers
3434 (71%)	Photographers and Audio-Visual Equipment Operators
3543 (18%)	Marketing Associate Professionals
4136 (11%)	Database Assistants
4137 (56%)	Market Research Interviewers
5244 (13%)	TV, Video, and Audio Engineers
5245x (21%)	IT Engineers
5411	Weavers and Knitters
5421 (37%)	Originators, Compositors, and Print Preparers
5422	Printers
5423	Bookbinders and Print Finishers
5424	Screen Printers
5491 (32%)	Glass and Ceramic Makers, Decorators and Finishers
5492	Furniture Makers and other Craft Woodworkers
5493	Pattern Makers (Moulds)
5494	Musical Instrument Makers and Tuners
5495 (49%)	Goldsmiths, Silversmiths, Precious Stones Workers
5496	Floral Arrangers, Florists
5499	Hand Craft Occupations (not listed elsewhere)
8112	Glass and Ceramics Process Operatives
9121	Labourers and Building and Woodworking Trades

Appendix 2

Creative Industries, By LEP (2017)

Selective LEPs	Buckinghamshire Thames Valley	Coast to Capital	Coventry and Warwickshire	Derby, Derbyshire, Nottingham & Notts	Dorset	Enterprise M3	Greater Birmingham and Solihull	Greater Cambridge & Peterborough	Greater Manchester	Leeds City Region	Leicester and Leicestershire	Liverpool City Region	London	North East	Oxfordshire	Sheffield City Region	Solent	South East	South East Midlands	Swindon and Wiltshire	Thames Valley Berkshire	West of England	York, North Yorkshire and East Riding	Total All LEPs
13100 : Preparation and spinning of textile fibres	0.03	0.03	0.00	0.29	0.20	0.03	0.02	0.14	3.62	15.17	0.72	0.00	0.08	0.18	0.14	0.30	0.02	0.03	0.07	0.14	0.00	0.00	0.24	2525
13200 : Weaving of textiles	0.00	0.47	0.00	1.74	4.18	0.01	0.02	0.03	2.32	8.15	1.51	0.06	0.06	0.05	0.00	0.00	0.05	0.11	0.02	0.00	0.00	0.06	2.50	4574
13300 : Finishing of textiles	0.07	0.22	0.62	1.60	0.15	0.18	1.00	0.62	2.34	3.79	10.90	0.22	0.35	1.00	0.19	1.94	0.18	0.36	0.35	0.73	0.05	0.47	0.81	5993
13910 : Manufacture of knitted and crocheted fabrics	0.00	0.00	0.00	21.79	0.00	0.00	0.00	0.16	2.05	2.32	14.97	0.53	0.02	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.11	815
13921 : Manufacture of soft furnishings	1.18	1.09	0.11	5.12	0.94	0.24	0.91	1.42	2.77	1.72	1.52	2.85	0.24	4.22	0.12	0.75	1.55	0.47	0.34	0.54	0.16	0.59	0.63	11194
13922 : Manufacture of canvas goods, sacks etc	0.41	0.60	0.44	1.62	7.51	0.66	0.24	2.85	1.25	1.88	0.32	2.68	0.13	1.04	0.27	3.65	5.83	1.04	0.83	0.77	0.01	1.64	1.12	2243
13923 : Manufacture of household textiles	0.30	0.19	0.19	2.24	0.56	0.06	0.79	0.44	5.48	3.66	0.55	2.76	0.10	2.94	0.22	0.37	0.10	0.50	0.43	0.04	0.00	0.94	0.76	5222
13931 : Manufacture of woven or tufted carpets and rugs	0.15	0.00	0.00	0.00	0.00	0.02	4.92	0.00	6.67	6.89	0.00	0.00	0.03	0.11	0.00	0.05	0.00	0.13	0.06	0.00	0.02	0.00	0.00	2246
13939 : Manufacture of carpets and rugs (other than woven or tufted)	0.00	0.26	0.00	3.52	0.00	0.00	6.42	0.00	0.89	4.14	0.00	0.00	0.04	0.00	0.00	1.19	0.00	0.00	0.91	0.00	0.00	0.00	0.00	1852
13940 : Manufacture of cordage, rope, twine and netting	0.33	0.00	0.00	0.00	13.63	0.10	0.32	0.00	3.36	0.00	1.25	0.57	0.61	2.83	0.00	0.76	0.00	4.21	0.09	0.00	0.09	1.56	1.59	762
13950 : Manufacture of non-wovens and articles made from non-wovens	0.00	0.00	1.07	0.00	0.00	0.00	0.00	0.00	7.19	5.25	1.29	1.49	0.00	0.49	0.00	0.00	0.00	2.89	1.44	0.00	0.00	0.00	4.23	923
13960 : Manufacture of other technical and industrial textiles	1.33	0.27	0.68	3.82	0.00	0.03	0.26	1.90	3.40	1.87	2.58	0.42	0.03	0.93	0.00	1.29	0.00	0.41	1.79	1.84	0.03	0.35	1.01	3252
13990 : Manufacture of other textiles nec	0.05	0.34	0.18	2.69	0.00	0.03	0.04	0.07	4.42	6.30	2.43	0.36	0.27	0.49	0.00	0.25	0.24	0.36	0.39	1.13	0.03	0.03	0.33	1827
14110 : Manufacture of leather clothes	0.00	0.37	0.00	0.00	0.00	0.00	0.61	0.00	0.50	0.00	6.53	0.00	2.00	4.58	0.00	0.00	2.21	0.00	0.00	0.00	0.00	0.00	0.00	267
14120 : Manufacture of workwear	0.64	0.06	0.20	0.38	0.43	0.23	2.60	1.17	0.87	1.13	8.39	0.97	0.30	3.00	0.06	0.48	0.80	0.54	0.90	0.06	0.10	6.09	0.08	2077
14131 : Manufacture of men's outerwear	0.24	0.57	0.39	0.31	0.24	0.66	1.77	0.04	1.06	0.47	2.78	0.21	1.78	2.28	0.10	0.11	0.51	0.21	0.43	0.22	0.00	0.10	0.05	3162
14132 : Manufacture of women's outerwear	0.21	0.30	1.05	1.90	0.05	0.05	0.48	0.08	0.54	1.87	9.17	0.12	1.75	1.27	0.28	0.05	0.06	0.19	0.17	0.01	0.06	0.03	0.03	10194
14141 : Manufacture of men's underwear	0.00	1.97	0.00	6.25	0.00	0.56	2.31	0.00	0.63	0.16	9.30	0.00	0.91	0.00	0.00	0.41	0.17	0.08	0.00	0.00	0.25	0.00	0.00	281
14142 : Manufacture of women's underwear	0.25	0.22	0.00	12.62	0.10	0.18	0.64	0.00	0.69	0.02	3.93	0.00	0.59	0.55	0.77	0.04	1.04	0.13	9.53	0.00	0.88	0.04	0.00	1330
14190 : Manufacture of other wearing apparel and accessories	0.09	13.48	0.88	1.27	0.30	0.37	0.63	1.86	0.85	0.24	10.54	0.84	1.28	0.61	0.76	0.38	0.25	0.87	0.78	0.32	0.05	0.12	0.60	5449
14200 : Manufacture of articles of fur	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	40
14310 : Manufacture of knitted and crocheted hosiery	0.00	0.00	0.00	23.07	0.00	0.00	0.00	0.00	0.46	0.00	25.05	0.00	0.02	0.17	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	724
14390 : Manufacture of other knitted and crocheted apparel	0.16	1.66	0.00	9.47	0.00	0.00	0.28	0.11	4.41	0.01	15.29	0.00	0.17	0.08	0.00	12.57	0.00	0.14	0.09	0.00	0.00	0.10	0.00	1570
15120 : Manufacture of luggage, handbags and the like, saddlery	0.38	0.44	0.31	0.32	0.05	0.11	0.66	2.45	0.31	0.07	2.27	0.46	0.17	0.00	0.00	0.22	0.07	0.39	0.72	1.91	0.07	1.13	0.23	2647
15200 : Manufacture of footwear	0.00	0.06	0.05	0.10	0.08	0.00	0.61	0.20	0.05	0.01	2.99	0.21	0.28	0.00	0.04	0.20	0.02	0.29	18.01	0.00	0.11	0.30	0.28	3121
18110 : Printing of newspapers	0.00	0.00	0.00	0.00	0.00	0.00	3.40	0.04	3.63	0.00	0.00	0.07	0.07	0.00	0.05	4.60	3.40	0.12	1.73	0.00	0.04	0.19	0.00	1098
18129 : Printing (other than printing of newspapers & printing on labels)	1.05	0.86	0.59	2.12	1.43	0.72	1.17	0.87	0.78	1.87	2.07	1.43	0.45	2.67	0.80	1.82	0.94	1.52	1.34	1.55	0.31	1.00	1.66	85960
18130 : Pre-press and pre-media services	0.38	0.54	0.56	1.30	0.65	0.24	1.48	0.57	1.58	2.58	3.37	0.47	0.54	2.47	0.51	0.73	0.48	0.88	0.94	1.21	0.37	0.80	1.54	8588
18201 : Reproduction of sound recording	5.09	1.48	0.99	1.08	0.94	0.63	0.45	0.65	0.35	0.25	0.37	0.87	1.67	0.68	0.67	1.40	0.14	1.15	0.73	1.17	0.09	1.20	0.16	1080
18202 : Reproduction of video recording	11.86	8.31	0.23	0.22	0.36	0.00	0.35	0.00	0.32	0.06	0.34	0.00	0.73	0.52	0.09	0.00	0.00	0.50	0.61	0.49	0.07	0.07	0.00	702
18203 : Reproduction of computer media	2.73	1.50	0.00	0.00	0.00	1.20	3.59	0.87	6.13	0.15	0.78	2.13	0.82	0.40	0.00	0.57	0.64	0.57	1.18	0.00	0.94	0.85	0.00	305
23410 : Manufacture of ceramic household and ornamental articles	0.00	0.17	0.02	6.17	0.02	0.58	0.00	0.07	0.00	0.05	0.03	0.20	0.09	0.11	1.36	0.08	0.67	0.15	0.04	0.04	0.01	0.01	0.06	5412
32120 : Manufacture of jewellery and related articles	0.51	1.25	0.39	0.63	0.21	0.59	7.79	3.14	0.21	0.30	0.26	0.55	0.64	0.36	0.52	4.08	0.15	2.24	0.90	0.71	0.14	0.17	0.29	4213
32130 : Manufacture of imitation jewellery and related articles	1.63	1.06	0.00	0.00	0.28	0.23	4.86	0.48	0.00	0.45	10.18	0.00	0.70	0.00	0.00	1.39	0.00	2.05	0.94	0.00	0.00	0.11	0.19	459
32401 : Manufacture of professional and arcade games and toys	0.00	1.62	0.00	8.78	0.79	0.11	0.04	1.51	0.46	0.45	0.00	0.15	0.16	0.38	0.00	0.24	0.05	2.04	0.00	0.12	1.31	0.21	0.27	964
47781 : Retail sale in commercial art galleries	0.20	0.53	1.35	0.94	0.85	0.41	1.78	0.75	0.17	1.44	0.51	1.30	1.50	0.21	0.65	1.02	0.39	0.48	0.15	0.99	0.12	0.92	3.68	5800
47789 : Other retail sale of new goods in specialised stores	0.79	1.18	0.84	1.42	2.39	0.80	0.86	1.14	0.94	1.32	1.60	1.07	0.50	0.46	0.65	1.80	0.93	1.71	0.92	1.24	0.37	1.00	3.17	69635
58110 : Book publishing	0.47	0.96	0.34	0.17	0.27	1.07	0.04	3.27	0.14	0.08	0.25	0.15	1.51	0.74	9.15	0.18	0.11	0.92	0.78	0.34	0.47	0.73	0.09	25430
58130 : Publishing of newspapers	1.18	0.32	0.25	0.36	1.01	0.26	0.32	0.42	0.67	0.75	0.34	2.53	1.23	0.97	1.36	0.88	5.61	1.40	0.27	0.40	0.27	0.39	0.58	34996
58141 : Publishing of learned journals	0.22	0.36	2.12	0.49	0.07	0.31	0.01	1.11	0.06	0.04	0.02	0.02	1.14	0.10	9.71	0.10	0.00	0.75	5.57	0.20	0.03	5.29	0.03	3427
58142 : Publishing of consumer, business and professional journals	0.23	2.16	0.16	0.27	0.77	0.50	0.17	1.98	0.32	0.20	0.39	0.43	1.64	0.57	1.76	0.27	0.27	1.86	0.54	0.41	0.19	1.58	0.13	37297
58190 : Other publishing activities	1.40	1.17	0.15	0.33	0.42	0.78	0.27	1.83	1.14	2.16	0.18	0.41	0.93	0.67	1.99	0.34	0.42	4.31	0.54	0.62	0.18	0.65	0.09	19388

Selective LEPs	Buckinghamshire Thames Valley	Coast to Capital	Coventry and Warwickshire	Derby, Derbyshire, Nottingham & Notts	Dorset	Enterprise M3	Greater Birmingham and Solihull	Greater Cambridge & Peterborough	Greater Manchester	Leeds City Region	Leicester and Leicestershire	Liverpool City Region	London	North East	Oxfordshire	Sheffield City Region	Solent	South East	South East Midlands	Swindon and Wiltshire	Thames Valley Berkshire	West of England	York, North Yorkshire and East Riding	Total All LEPs
58210 : Publishing of computer games	0.37	2.68	0.05	1.35	2.69	1.75	0.16	2.33	0.33	0.10	0.25	1.35	1.03	0.84	0.19	0.07	0.35	1.91	1.02	0.07	2.68	0.23	0.00	1556
58290 : Other software publishing	2.04	1.77	0.43	0.48	0.62	1.39	0.31	2.75	0.75	0.68	0.65	0.48	1.04	1.38	2.40	0.21	0.77	1.15	1.29	0.69	1.96	0.36	0.71	10785
59111 : Motion picture production activities	5.19	0.54	0.15	0.10	0.33	1.16	0.40	0.60	0.19	0.12	0.12	0.24	1.78	0.61	0.31	0.15	0.15	0.52	0.47	0.15	0.25	1.19	0.18	21115
59112 : Video production activities	1.28	1.53	1.25	0.27	1.09	0.92	0.71	2.38	0.67	0.16	0.21	0.43	1.18	0.90	0.61	0.17	0.44	1.20	1.21	0.80	0.35	0.68	0.16	5015
59113 : Television programme production activities	1.81	0.60	0.22	0.11	0.27	0.43	0.51	0.40	0.87	0.57	0.04	1.01	2.11	0.52	0.40	0.14	0.31	0.38	0.30	0.11	0.48	0.92	0.05	25750
59120 : Motion picture, video & television programme post-production activities	2.86	0.53	0.17	0.08	0.37	0.48	0.37	0.73	0.30	0.03	0.04	0.13	2.34	0.51	0.27	0.05	0.09	0.69	0.26	0.24	0.16	0.92	0.04	12022
59131 : Motion picture distribution activities	0.15	0.49	6.30	0.10	0.34	0.11	0.20	0.11	0.08	0.01	0.02	0.01	2.45	0.13	0.06	0.13	0.02	0.72	0.44	0.00	0.06	0.05	0.08	5165
59132 : Video distribution activities	28.14	1.42	0.17	0.00	0.38	0.53	0.16	0.22	0.00	0.05	0.00	0.22	0.58	0.00	0.12	0.06	0.05	0.75	12.03	0.00	0.07	0.00	0.00	988
59133 : Television programme distribution activities	0.53	0.47	0.00	0.06	0.60	0.25	0.00	0.00	0.53	0.00	0.00	0.00	2.43	0.71	0.29	0.09	0.08	1.21	1.71	0.00	0.19	0.33	0.00	630
59140 : Motion picture projection activities	0.67	1.40	0.98	0.98	1.18	0.56	1.50	1.61	1.04	0.83	0.99	1.87	0.69	1.38	0.81	1.19	0.88	1.23	1.06	1.40	0.35	1.48	0.55	17177
59200 : Sound recording and music publishing activities	0.71	0.83	0.40	0.13	0.20	0.46	1.33	1.09	0.16	0.08	0.10	0.28	2.02	0.79	0.43	0.23	0.19	0.95	0.89	0.83	0.16	0.48	0.09	8908
60100 : Radio broadcasting	0.57	0.55	0.79	0.91	0.12	0.33	0.73	0.08	0.75	0.44	0.02	0.46	2.20	0.46	0.17	0.33	0.76	0.21	0.20	0.23	0.36	0.40	0.73	10451
60200 : Television programming and broadcasting activities	1.22	0.09	0.10	0.00	0.01	0.12	0.40	0.05	2.72	0.15	0.00	0.01	2.57	0.06	0.03	0.05	0.04	0.15	0.03	0.02	0.07	0.07	0.02	24783
61100 : Wired telecommunications activities	1.09	2.00	0.18	0.98	0.60	1.89	0.45	0.33	1.50	0.50	0.49	2.35	0.82	0.20	1.07	0.28	1.53	1.37	1.09	1.56	1.08	1.25	0.70	10322
61200 : Wireless telecommunications activities	0.62	0.46	0.23	0.92	1.00	1.20	0.73	0.33	1.68	0.90	0.26	3.57	0.59	0.41	0.43	1.80	0.77	0.37	0.42	1.15	6.76	0.77	0.21	31941
61300 : Satellite telecommunications activities	0.29	0.94	0.00	0.04	0.50	0.54	0.01	0.12	3.77	2.86	0.00	0.05	0.43	7.32	2.22	5.39	0.49	0.35	2.65	4.81	0.07	0.21	0.06	4517
61900 : Other telecommunications activities	1.10	1.00	0.67	0.66	1.12	1.37	0.99	0.71	1.53	0.71	0.74	1.25	0.66	1.58	0.60	1.41	1.20	0.89	0.96	1.55	1.55	1.04	0.46	150304
62011 : Ready-made interactive leisure and entertainment software development	0.34	2.10	5.76	1.21	0.62	2.73	0.71	3.05	0.64	0.25	0.12	1.27	1.03	0.72	1.43	0.25	0.44	0.33	0.35	0.20	0.32	0.71	0.28	9419
62012 : Business and domestic software development	1.04	0.94	1.35	0.98	0.76	1.63	1.15	1.43	1.04	0.77	0.85	0.89	0.86	1.23	1.05	0.97	0.93	0.71	1.09	0.63	2.42	1.16	0.82	142207
62020 : Computer consultancy activities	1.32	1.14	1.32	0.89	0.96	1.68	1.17	1.04	0.84	0.79	0.85	0.88	0.93	0.87	0.82	0.84	0.87	1.04	1.25	1.38	1.53	0.90	0.85	335612
62090 : Other information technology and computer service activities	1.03	1.57	2.07	0.98	1.27	1.25	0.92	0.98	0.89	0.59	0.73	0.75	0.89	0.59	1.05	0.78	2.85	0.84	1.11	0.96	1.25	1.11	0.74	114888
63120 : Web portals	0.17	0.40	0.21	0.22	1.89	0.27	0.19	1.53	0.11	0.24	0.33	0.09	2.19	0.20	0.14	0.41	0.25	0.46	0.23	0.70	0.24	1.36	0.55	8532
63910 : News agency activities	0.08	0.19	0.10	0.52	0.41	0.05	0.08	0.25	0.10	0.11	0.14	0.04	2.48	0.06	0.09	0.02	0.15	0.13	0.08	0.23	0.17	0.37	5.00	11437
71111 : Architectural activities	0.42	0.66	0.92	0.62	1.57	0.72	0.85	0.71	0.82	0.83	0.79	0.79	1.34	1.36	0.55	0.97	0.35	0.94	0.50	1.23	0.24	1.93	1.54	63159
73110 : Advertising agencies	1.38	0.63	0.40	0.32	1.09	0.80	0.80	0.35	0.86	1.86	0.44	0.53	1.39	0.34	2.12	1.24	0.54	0.74	0.73	0.36	0.43	1.10	1.83	110095
73120 : Media representation	0.30	0.78	0.25	0.28	0.73	0.57	0.89	0.24	1.02	1.37	0.29	0.32	1.63	0.34	0.19	0.54	0.30	0.62	0.42	0.17	2.07	0.29	2.32	18290
74100 : Specialised design activities	0.74	0.98	1.64	1.60	0.93	0.89	1.30	0.94	0.67	1.08	3.01	0.55	1.03	0.43	0.88	1.15	0.49	1.32	1.26	0.64	0.37	0.92	1.30	46397
74201 : Portrait photographic activities	0.38	0.91	0.69	1.67	0.91	0.41	0.65	0.25	0.42	1.10	1.55	0.73	0.79	0.19	1.27	0.55	1.01	0.73	1.42	0.96	0.34	0.42	1.27	3472
74202 : Other specialist photography (not including portrait photography)	1.33	1.18	1.67	1.87	1.58	1.39	0.24	0.48	0.34	0.89	3.38	1.06	1.00	0.23	0.70	0.60	0.13	0.61	0.70	1.54	1.24	0.58	1.05	2320
74203 : Film processing	0.29	0.57	3.34	1.09	0.74	0.70	1.07	1.43	0.68	0.80	0.79	5.48	0.76	1.01	1.14	1.22	0.65	0.97	1.07	0.77	0.44	0.54	1.42	3429
74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec	0.82	2.33	0.66	1.09	1.22	0.71	0.72	1.08	1.09	0.55	1.37	0.62	1.06	0.36	1.18	0.83	0.91	1.68	1.12	0.48	0.41	0.59	0.85	6961
78101 : Motion picture, television and other theatrical casting	1.54	0.00	0.00	0.80	0.00	0.16	0.50	0.18	0.59	0.09	0.00	0.30	2.63	0.17	0.00	0.12	0.00	1.08	0.00	0.00	0.05	0.00	0.00	487
78109 : Activities of employment placement agencies	0.27	1.28	1.11	1.70	0.55	0.50	1.72	1.63	1.28	1.11	0.91	1.04	0.73	0.62	0.86	1.29	1.48	1.08	1.40	1.39	0.68	1.40	0.54	146308
85520 : Cultural education	4.61	0.60	1.39	0.80	0.42	1.16	0.53	0.47	0.66	0.87	1.26	2.95	0.82	2.18	0.87	0.80	0.25	1.12	2.86	0.29	0.34	0.43	1.14	5467
90010 : Performing arts	0.70	1.33	2.14	0.46	0.52	0.54	1.33	0.31	1.18	0.76	0.55	1.61	1.44	0.77	0.49	0.48	0.56	0.84	0.69	0.53	0.20	1.03	1.48	35078
90020 : Support activities to performing arts	1.23	1.07	0.43	0.47	2.05	0.79	0.70	0.30	1.13	0.80	0.28	1.17	1.46	4.28	0.23	0.71	0.23	0.55	0.94	0.43	0.15	0.59	1.59	6440
90030 : Artistic creation	0.95	1.12	0.78	1.16	1.39	0.61	0.67	0.57	0.79	0.67	0.73	1.38	1.39	1.07	0.86	0.69	0.38	0.67	0.77	1.14	0.18	1.17	1.12	21305
90040 : Operation of arts facilities	0.20	0.89	0.28	1.33	0.86	0.42	1.73	0.41	1.35	0.94	0.25	2.13	1.21	1.53	0.34	1.64	0.70	1.39	0.63	0.89	0.22	1.21	0.18	11397
91011 : Library activities	0.46	0.89	1.16	0.98	2.16	0.57	1.10	1.53	0.55	1.67	1.41	1.87	0.66	1.41	1.05	1.52	0.89	1.50	1.16	1.58	0.37	0.54	1.49	25989
91012 : Archive activities	2.08	1.09	0.04	0.88	4.01	0.00	0.00	0.28	0.35	0.87	0.46	3.47	1.26	1.02	0.29	0.89	0.94	1.97	0.16	0.00	0.50	0.02	1.91	2085
91020 : Museum activities	0.68	0.24	1.44	0.62	1.59	0.55	1.31	0.93	0.57	1.41	0.78	1.71	1.21	2.32	0.63	0.48	0.61	0.75	0.81	0.71	0.04	1.19	2.05	23706
91030 : Operation of historical sites and buildings and similar visitor attractions	0.42	0.97	3.31	1.46	1.50	1.07	0.31	1.20	0.14	0.88	0.13	0.86	0.40	2.73	1.79	2.25	1.59	1.77	1.48	4.14	0.76	1.10	5.21	12388
Total Employees	225994	817788	430883	914213	315422	726735	884093	653127	1213017	1338950	454558	598428	4888797	797612	354596	733140	514942	1552443	885955	307076	491000	555601	483276	26302479
Total Creative Employees	22677	57928	22908	48361	14897	72172	46488	42773	84781	82947	23828	26099	597199	46312	31311	32507	38388	86382	52555	16407	79259	36530	21757	1887341

Appendix 3

Gross Value Added (2016)

	North East	North West	Yorkshire & Humber	East Midlands	West Midlands	East	London	South East	South West	Wales	Scotland	Northern Ireland	UK Total
Creative Industries sub-sector													
Advertising & Marketing	67	858	252	124	283	425	8315	1071	479	51	302	68	12,312
Architecture	38	246	170	152	163	242	1,977	524	296	78	238	79	4,203
Crafts	3	13	25	13	97	46	119	57	24	2	17	4	421
Design and designer fashion	53	214	149	129	104	266	1,662	476	214	129	113	28	3,537
Film, TV, video, radio, photography	78	505	237	120	171	431	11,609	863	384	221	616	101	15,361
IT, software, computer services	563	2,525	1,253	1,122	1,803	2,617	10,748	9,709	1,753	339	1,728	596	34,704
Publishing	59	405	342	176	198	678	6,707	2,121	514	69	291	61	11,622
Museums, galleries, libraries	40	104	45	29	170	78	365	372	62	18	139	9	1,430
Music, performing & visual arts	83	325	98	129	211	280	5,492	847	328	150	220	65	8,237
Sub-total Creative Industries	984	5195	2571	1994	3200	5063	46994	16040	4054	1057	3664	1011	91827
Cultural sub-sector													
Arts	55	246	60	83	38	225	4,311	685	328	100	140	-25	6,075
Film, TV and music	66	455	225	96	279	374	12,439	790	314	220	635	90	15,814
Radio	-18	34	-10	-33	275	-89	7	-98	-83	7	-40	204	432
Photography	15	67	34	30	7	97	397	156	104	12	35	-4	908
Crafts	4	13	27	16	27	56	124	62	30	2	18	-3	421
Museums and galleries	40	76	39	28	46	40	297	334	69	12	117	-5	1,148
Library and archives	5	24	9	6	2	55	82	71	7	5	33	-2	282
Cultural education	35	52	33	69	13	81	153	123	29	34	72	-20	700
Heritage	65	36	27	36	17	64	69	440	94	10	155	-21	987
Sub-total Cultural Sector	266	1,004	442	330	705	903	17,878	2,564	891	403	1,165	214	26,766
Digital Sub-sector													
Manufacturing electronics & computers	56	248	90	200	132	419	108	946	209	333	181	162	3,070
Wholesale computers & electronics	31	542	289	351	303	458	1,177	1,027	123	84	226	34	4,645
Publishing	55	387	305	172	193	671	6,658	2,061	513	62	284	61	11,434
Software publishing	3	46	78	22	42	61	982	177	33	0	22	3	1,470
Film, TV, video, radio & music	67	442	215	94	170	361	12,501	772	306	228	624	105	15,916
Telecommunications	1,581	2,795	1,673	783	1,740	2,496	6,915	7,606	1,625	766	1,636	360	29,955
Computer programming, consultancy	629	2,896	1,416	1,374	2,601	3,257	12,463	11,874	2,336	495	2,062	635	42,023
Information services	93	262	103	484	197	170	3,304	677	141	143	147	13	5,741
Repair computers and communication equipt	31	319	54	155	199	222	278	678	90	23	186	7	2,240
Sub-total Digital Sector	2,545	7,937	4,223	3,633	5, 576	8,114	44,384	25,818	5,377	2,136	5,368	1,382	116,494

Appendix 4

Creative Location Quotients (2017) Leicester and London (BRES, 2017)

Industry	Leicester and Leicestershire	London
13100 : Preparation and spinning of textile fibres	0.72	0.08
13200 : Weaving of textiles	1.5	0.06
13300 : Finishing of textiles	10.9	0.34
13910 : Manufacture of knitted and crocheted fabrics	14.96	0.01
13921 : Manufacture of soft furnishings	1.52	0.24
13922 : Manufacture of canvas goods, sacks etc	0.31	0.12
13923 : Manufacture of household textiles (other than soft furnishings of 13921)	0.54	0.1
13931 : Manufacture of woven or tufted carpets and rugs	0	0.02
13939 : Manufacture of carpets and rugs (other than woven or tufted) nec	0	0.03
13940 : Manufacture of cordage, rope, twine and netting	1.24	0.6
13950 : Manufacture of non-wovens and articles made from non-wovens, except apparel	1.28	0
13960 : Manufacture of other technical and industrial textiles	2.58	0.03
13990 : Manufacture of other textiles nec	2.42	0.27
14110 : Manufacture of leather clothes	6.52	2
14120 : Manufacture of workwear	8.38	0.3
14131 : Manufacture of men's outerwear, other than leather clothes and workwear	2.78	1.77
14132 : Manufacture of women's outerwear, other than leather clothes and workwear	9.16	1.75
14141 : Manufacture of men's underwear	9.3	0.91
14142 : Manufacture of women's underwear	3.93	0.59
14190 : Manufacture of other wearing apparel and accessories	10.53	1.27
14200 : Manufacture of articles of fur	0	1.1
14310 : Manufacture of knitted and crocheted hosiery	25.05	0.02
14390 : Manufacture of other knitted and crocheted apparel	15.28	0.17
15120 : Manufacture of luggage, handbags and the like, saddlery and harness	2.27	0.16
15200 : Manufacture of footwear	2.99	0.28
18110 : Printing of newspapers	0	0.07
18129 : Printing (other than printing of newspapers and printing on labels and tags) nec	2.06	0.44
18130 : Pre-press and pre-media services	3.36	0.54
18201 : Reproduction of sound recording	0.36	1.66
18202 : Reproduction of video recording	0.33	0.73
18203 : Reproduction of computer media	0.77	0.81
23410 : Manufacture of ceramic household and ornamental articles	0.02	0.09
32120 : Manufacture of jewellery and related articles	0.26	0.63
32130 : Manufacture of imitation jewellery and related articles	10.18	0.7
32401 : Manufacture of professional and arcade games and toys	0	0.16
47781 : Retail sale in commercial art galleries	0.5	1.49
47789 : Other retail sale of new goods in specialised stores (other than by opticians or commercial art galleries), nec	1.6	0.5
58110 : Book publishing	0.25	1.5
58130 : Publishing of newspapers	0.34	1.23
58141 : Publishing of learned journals	0.02	1.13
58142 : Publishing of consumer, business and professional journals and periodicals	0.38	1.63
58190 : Other publishing activities	0.18	0.92

Industry	Leicester and Leicestershire	London
58210 : Publishing of computer games	0.25	1.02
58290 : Other software publishing	0.64	1.03
59111 : Motion picture production activities	0.12	1.78
59112 : Video production activities	0.2	1.18
59113 : Television programme production activities	0.03	2.1
59120 : Motion picture, video and television programme post-production activities	0.03	2.33
59131 : Motion picture distribution activities	0.01	2.45
59132 : Video distribution activities	0	0.57
59133 : Television programme distribution activities	0	2.42
59140 : Motion picture projection activities	0.98	0.68
59200 : Sound recording and music publishing activities	0.09	2.02
60100 : Radio broadcasting	0.01	2.19
60200 : Television programming and broadcasting activities	0	2.56
61100 : Wired telecommunications activities	0.49	0.82
61200 : Wireless telecommunications activities	0.26	0.58
61300 : Satellite telecommunications activities	0	0.43
61900 : Other telecommunications activities	0.74	0.66
62011 : Ready-made interactive leisure and entertainment software development	0.11	1.03
62012 : Business and domestic software development	0.85	0.85
62020 : Computer consultancy activities	0.84	0.92
62090 : Other information technology and computer service activities	0.73	0.88
63120 : Web portals	0.33	2.18
63910 : News agency activities	0.13	2.48
71111 : Architectural activities	0.78	1.34
73110 : Advertising agencies	0.44	1.38
73120 : Media representation	0.29	1.62
74100 : Specialised design activities	3	1.03
74201 : Portrait photographic activities	1.55	0.79
74202 : Other specialist photography (not including portrait photography)	3.37	0.99
74203 : Film processing	0.78	0.76
74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec	1.36	1.06
78101 : Motion picture, television and other theatrical casting	0	2.63
78109 : Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec	0.9	0.72
85520 : Cultural education	1.26	0.82
90010 : Performing arts	0.55	1.44
90020 : Support activities to performing arts	0.28	1.45
90030 : Artistic creation	0.73	1.39
90040 : Operation of arts facilities	0.25	1.2
91011 : Library activities	1.41	0.65
91012 : Archive activities	0.45	1.26
91020 : Museum activities	0.78	1.2
91030 : Operation of historical sites and buildings and similar visitor attractions	0.12	0.39

Appendix 5 Creative Salaries (2017)

Activity	SIC Code	Median Salary (£)			
		UK	Male	Female	Leicester
Preparation & Spinning of Textiles	1310	20,135	18,423	10,813 (49.4%)	--
Weaving of Textiles	1320	20,946	21,809	20,135 (0.09%)	--
Manufacture of Textiles	1392	15,048	15,250	11,925 (21.8%)	--
Manufacture Carpets & Rugs	1393	26,495	34,087	23,173 (32%)	--
Manufacture Other Textiles	1396	21,099	21,505	--	14,325 (32.1%)
Manufacture Outerwear	1413	17,125	--	--	--
Manufacture Knitted & Crocheted Hosiery	1431	17,623	--	17,924 (+0.1%)	--
Footwear	1520	20,283	23,351	15,357 (34.2%)	18,164 (10.4%)
Printing	1812	22,918	23,593	19,778 (16.64%)	--
Book Publishing	5811	25,424	40,152	11,924 (70.3%)	11,924 (53.09%)
Software Publishing	5829	35,811	--	--	--
Motion Picture, Video & TV	5911	29,921	28,099	27,030 (3.57%)	--
TV Programmes & Broadcasting	6020	38,943	32,065	30,351 (4.4%)	34,672 (10.96%)
Other Telecommunications	6190	33,397	41,843	29,070 (30.52%)	41,843 (+25.28%)
Computer Programming	6208	34,506	36,476	--	--
Computer Consultancy	6202	35,175	39,903	30,279 (24.11%)	37,632 (+6.87%)
PR & Communications	7021	16,856	--	17,097	--
Architecture	7111	30,589	33,020	28,016 (15.15%)	38,037 (+24.34%)
Design	7410	29,308	21,543	--	21,543 (26.49%)
Photography	7420	17,037	17,037	15,767 (7.45%)	--
Cultural Education	8552	--	--	--	--
Performing Arts	9001	27,074	--	--	--
Support Activities for Performing Arts	9002	--	--	--	--
Artistic Creation	9003	--	--	--	--
Arts Facilities	9004	--	--	--	--
Library & Archives	9101	22,183	24,560	24,167 (1.62%)	19,809 (10.7%)
Museums	9102	19,082	20,665	--	--

